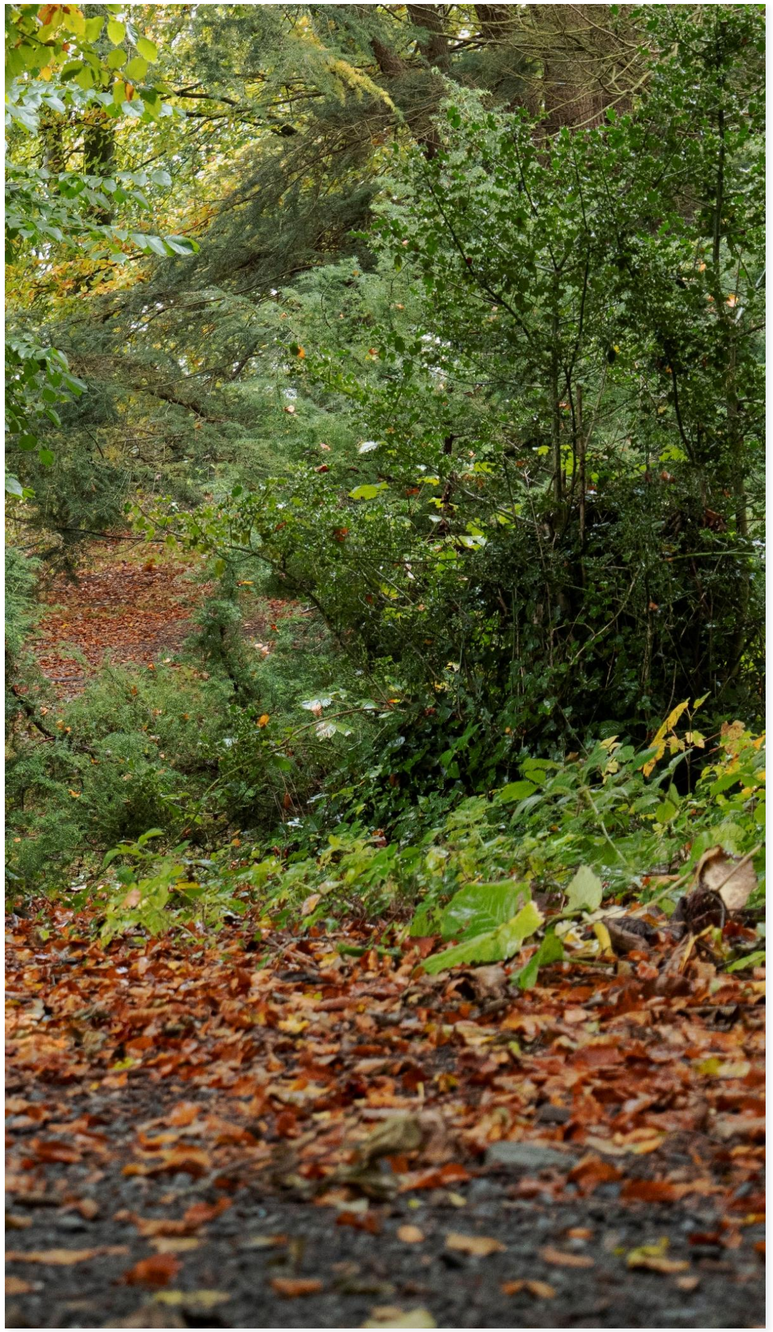






TOURISM NORTHERN IRELAND

TOURISM 360°

State of the Nation - November 2026

Contents

03. Tourism Performance Statistics

05. NI Hotel Performance

06. Other Accommodation & Attractions

07. Cardholder Spend

08. Air & Sea Access

09. Consumer Confidence

10. Upcoming Research & Statistics

Summary

Tourism in Northern Ireland remains resilient in 2026, with variations in performance by region and sector. Official tourism statistics suggest overnight trips and visitor expenditure increased compared with last year.

Supplementary data sources are encouraging, with hotels recording higher room sales and occupancy slightly ahead of last year, while small service accommodation performance was broadly stable. Tourism-related cardholder spend and air passenger numbers also increased. The picture is mixed, however, with varied performance across visitor attractions and ferry passenger volumes down.

While consumer confidence remains subdued, impacted by ongoing cost pressures and economic uncertainty, stable hotel bookings and the importance consumers place on travel support a cautiously optimistic near-term outlook. Against this backdrop, pressure on household budgets continues to drive a strong focus on value.

NISRA Q1 Performance Statistics

January-March 2026 tourism statistics released by the Northern Ireland Statistics and Research Agency (NISRA) point to an encouraging start to the year for NI tourism, with growth of 6% for both overnight trips and expenditure compared to the same period last year..

While the quarterly results should be treated with caution due to sample size and seasonal effects, the data suggest that the positive performance has been underpinned by a strong domestic market, with additional momentum from international visitors and continued resilience from Republic of Ireland (ROI) and GB markets.

Growth in trips was evident for each main purpose of visit but strongest for business and other trips, with visiting friends and relatives also performing well. Holiday remained the most popular reason to visit NI and, while trip volumes were only slightly ahead of last year, holiday expenditure grew more strongly, helping to drive the value of tourism.

1.0m Trips

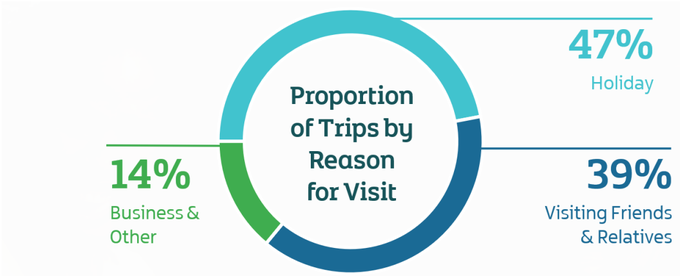
+6% vs Q1 2025

2.6m Nights

+1% vs Q1 2025

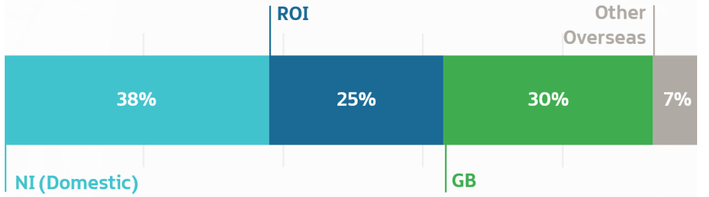
£222m Spend

+6% vs Q1 2025



Number of Trips by Reason for Visit vs Q1 2025	Holiday	VFR	Business & Other
	+1%	+7%	+26%

Proportion of Trips by Market



Number of Trips by Market vs Q1 2025	NI	ROI	GB	Other
	+14%	+1%	On Par	+13%

Average Length of Stay

2.6 Nights

On Par with Q1 2025

Average Spend per Trip

£217.30

-1% vs Q1 2025

Source: NISRA

ROI Overnight Trips Taken in NI

Figures released by the Central Statistics Office (CSO) relating to overnight trips taken by ROI residents on the island of Ireland indicate responsible tourism growth in the first half of 2026, with ROI visitors staying longer and spending more in NI.

Following growth of more than two-fifths in the first half of 2025, the number of holiday trips was maintained at a similarly strong level during January-June 2026.

CSO's ROI to NI data broadly aligns with Tourism NI's Consumer Sentiment and Industry Research, which both pointed to positive ROI performance in the first half of the year.

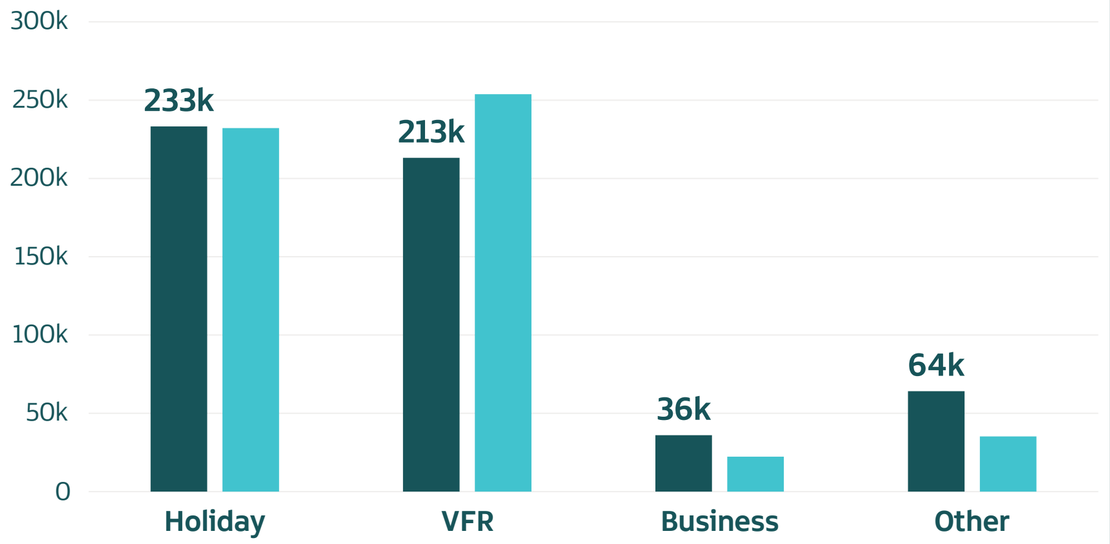
Following declines in trips, nights and spend in January-June 2025 versus the same period in 2024, ROI domestic tourism rebounded in the first half of 2026, with growth across all three key performance indicators.

546k
Trips
+1% vs Jan-June 2025

1.1m
Nights
+10% vs Jan-June 2025

£109m
Spend
+3% vs Jan-June 2025

ROI Overnight Trips to NI **Jan-June 2026 vs 2025**



Source: CSO

NI Hotel Performance

NI's hotel performance during January-September 2026 is now slightly above the same period last year, with a minor uptick in room occupancy and a 5% growth in room sales.

NI's year-to-date average daily rate (ADR) is broadly on par with the first 9 months of 2025 while Revenue per Available Room (RevPAR) has increased as a result of the positive year-to-date occupancy.

Year-to-date ADR had been faring well earlier in the year but dropped when The Open Championship in July 2025 became included in the comparison data.

Looking ahead, occupancy on the books for NI hotels over the next few months closely mirror last year's performance. Encouragingly, scheduled events such as the Christmas Lights Switch-On event in Belfast and various musical and comedic performances across NI appear to be having a positive impact on hotel performance.

Key Metrics
Jan-Sep 2026 v Jan-Sep 2025

Room Occupancy	Change vs 2025
73.8%	+1.0pp

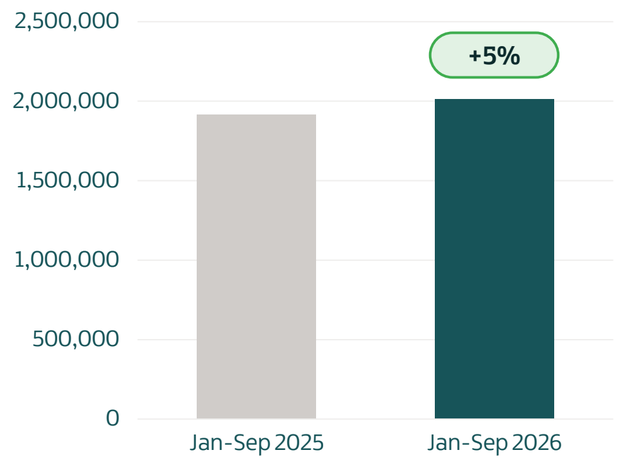
pps = percentage point

ADR	Change vs 2025
£118.25	-0.2%

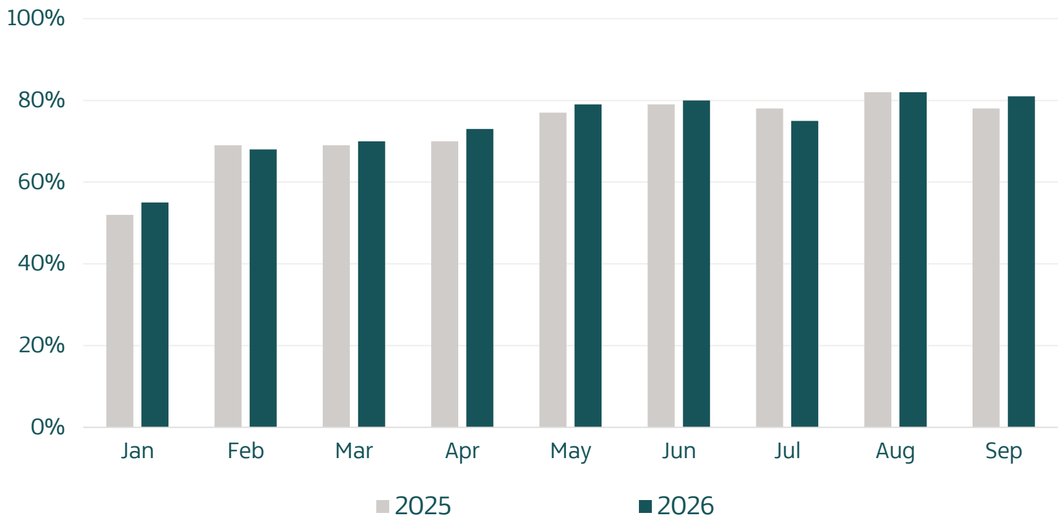
RevPAR	Change vs 2025
£87.24	+1.2%

Room Sales	Change vs 2025
2.0m	+5%

Room Sales
Jan-Sep 2026 v Jan-Sep 2025



NI Room Occupancy by Month vs previous year



Source: STR

Other Accommodation & Attractions

Small Service* Accommodation:

NISRA statistics for January-August 2026 indicate a broadly stable performance for small service accommodation. Room occupancy was slightly below the same period in 2025, while bed occupancy remained on par.

A marginal decrease was evident for room sales while bed sales grew by 5%.

Small service occupancy rates are available for nine of the eleven local government districts (LGD) in NI and indicate variations in regional performance, with room occupancy increasing in only three of the nine LGDs for which data is available.

Visitor Attractions:

Feedback from visitor attractions points to a mixed performance, with some reporting growth in visitor numbers and/or revenue, while others experienced declines. Performance varies across the sector and can be influenced by factors including weather, location, attraction type and the visitor markets served.

Small Service Room Occupancy – Jan-Aug 2026

39%

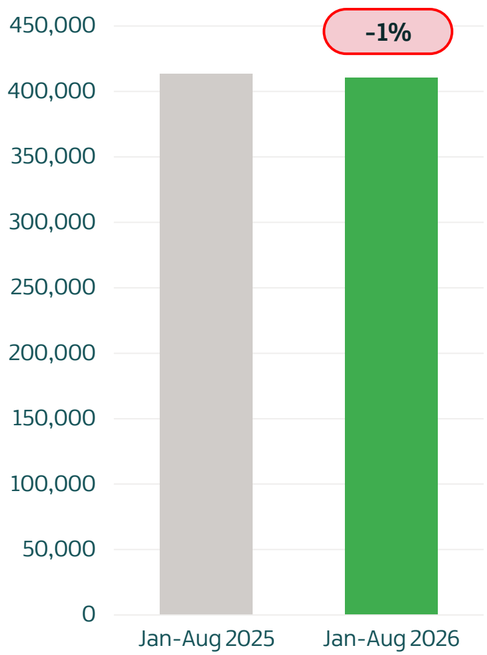
-2pps vs Jan-Aug 2025

Small Service Bed Occupancy – Jan-Aug 2026

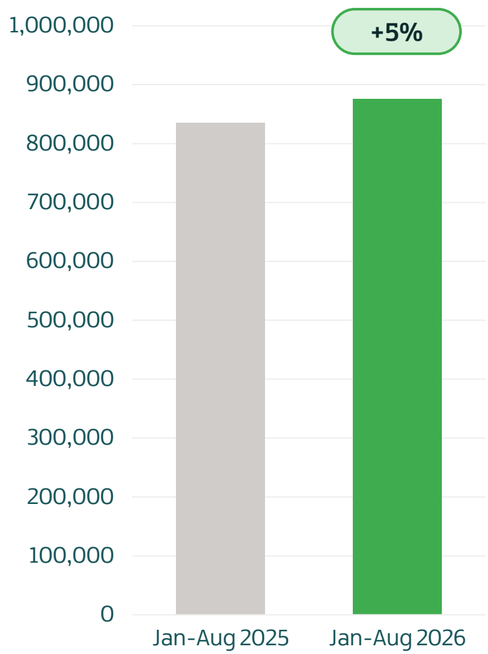
37%

On Par with Jan-Aug 2025

Small Service Room Sales - Jan-Aug 2026



Small Service Bed Sales - Jan-Aug 2026



Sources: NISRA & Tourism NI

**Small service accommodation = guesthouses, guest accommodation and B&Bs*

Cardholder Spend

Overall tourism-related cardholder spend in NI grew by 8% during the first half of the year. Spend increased across all key market areas, most notably for ROI and GB, with smaller growth evident for the domestic market.

Overall accommodation spend delivered strong growth, while spend in restaurants / bars was more subdued, reflecting current consumer sentiment. The number of card transactions was up 3% compared to the same period in 2025.

Note:

Due to the market share of the card company, and because accommodation can be booked in advance through a third-party platform rather than through a local business or branch, the spend data should be seen as indicative of trends rather than providing actual spend figures. Data is sometimes withheld to protect merchant and cardholder confidentiality.

Tourism-Related* Spend by Market

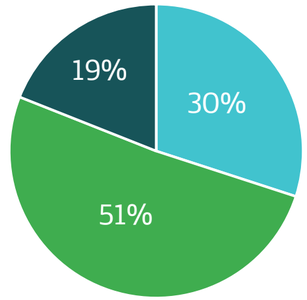
(Jan-June 2026 vs 2025)

All Markets	+8%
NI	+15%
ROI	+3%
GB	+25%
Other Overseas	+12%

Tourism-related category	All-market spend (Jan-June 2026 vs 2025)
Eating Places/ Restaurants	+3%
Bars	+4%
Accommodation	+27%

Spend by tourism-related category

(Jan-June 2026)



Source: Tourism NI analysis of cardholder spend data

**Tourism-related categories includes bars/taverns, eating places & restaurants and hotels/motels/resorts.*

Air & Sea Access

NI Air Passenger Flow

Civil Aviation Authority (CAA) airport data shows that air passenger flow for NI during January-July 2026 stood at 5.5 million, 3% above figures from the same period in 2025.

Passenger numbers through all NI airports saw increases vs 2025, with City of Derry Airport's passenger flow experiencing greater growth than Belfast International Airport and George Best Belfast City Airport.

NI-GB Ferry Passengers

Ferry data for January-September 2026 indicates that the number of passengers travelling on ferries to and from NI experienced a small decline (-4%) vs the first nine months of 2025.

For comparison, passenger numbers travelling to and from ROI in January-September 2026 decreased by 1%, with growth in the Central Corridor (Dublin) being cancelled out by a fall in ferry passengers through the Southern Corridor

Sources: CAA & IRN Ferry

Air Access – Passenger Flow through NI's Main Airports

NI Air Passenger Flow (Jan-July 2026)

5.5m Passengers

+3% vs Jan-July 2025



Belfast International	George Best Belfast City	City of Derry
+2%	+7%	+17%

Jan-July 2026 vs Jan-July 2025

Sea Access – Ferry Passengers to/from NI and ROI

Ferry Passengers to/from NI	Ferry Passengers to/from ROI
-4%	-1%
Jan-Sep 2026 vs Jan-Sep 2025	Jan-Sep 2026 vs Jan-Sep 2025

Consumer Confidence

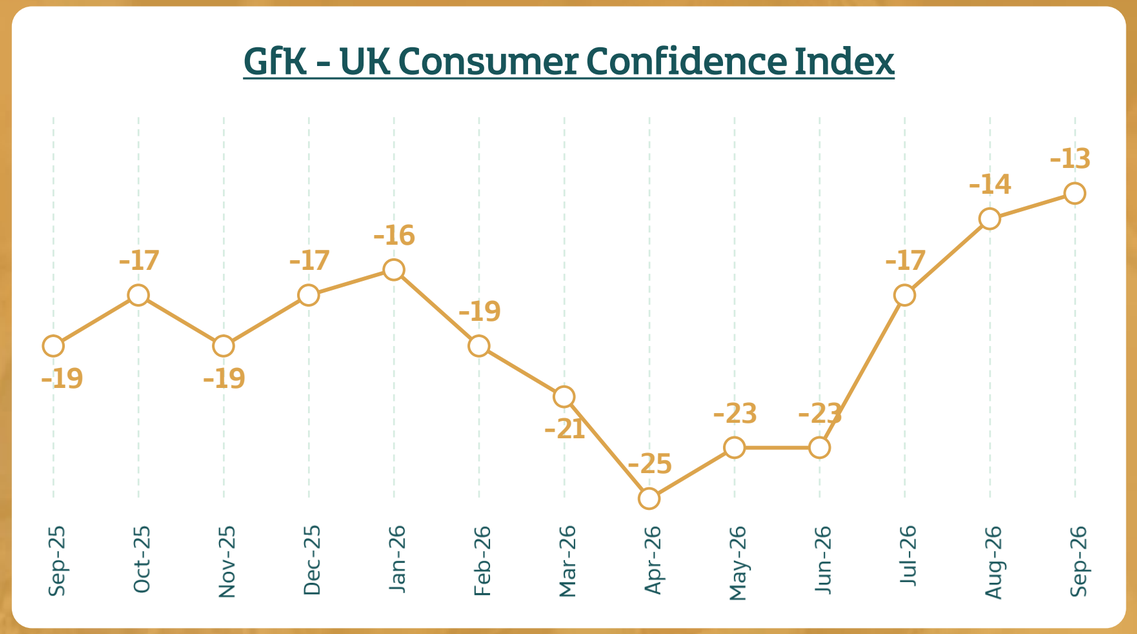
UK Consumer Confidence

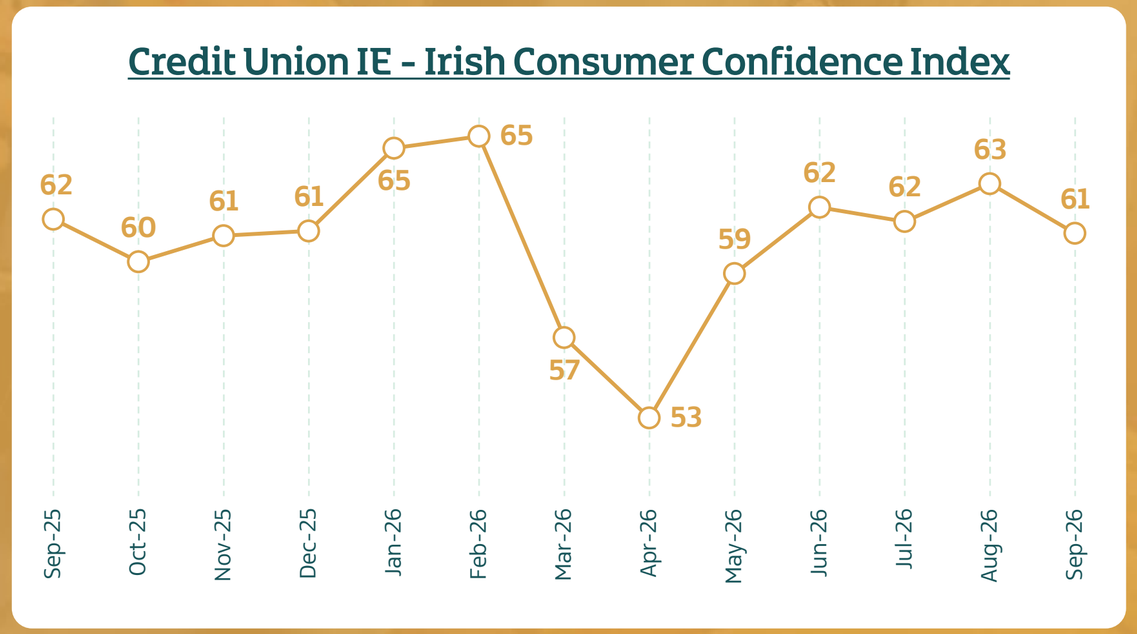
GfK's UK Consumer Confidence Index improved by one point to -13 in September, marking the third consecutive monthly increase and the first time this has occurred since summer 2024.

However, confidence remains in negative territory, with rising inflation, energy and fuel costs continuing to create uncertainty around household finances and discretionary spending.

ROI Consumer Confidence

Irish consumer confidence eased by 2 percentage points in September, leaving sentiment at a four-month low. Rising energy and transport costs, higher interest rates, a cooling jobs market and continued pressure on household finances all contributed to the weaker outlook. Contained fall in sentiment suggests that while Irish consumers are nervous, they are not dramatically more negative.





Sources: GfK/NiQ & Credit Union Ireland

Upcoming Research & Statistics

5th Nov

NISRA Q2 2026 Tourism Performance Statistics:

This publication will include overnight trips, nights and spend in NI for January-June 2026, with main market and reason for visit breakouts, and 12-month day trip figures.

Early Nov

Tourism NI Consumer Sentiment Analysis:

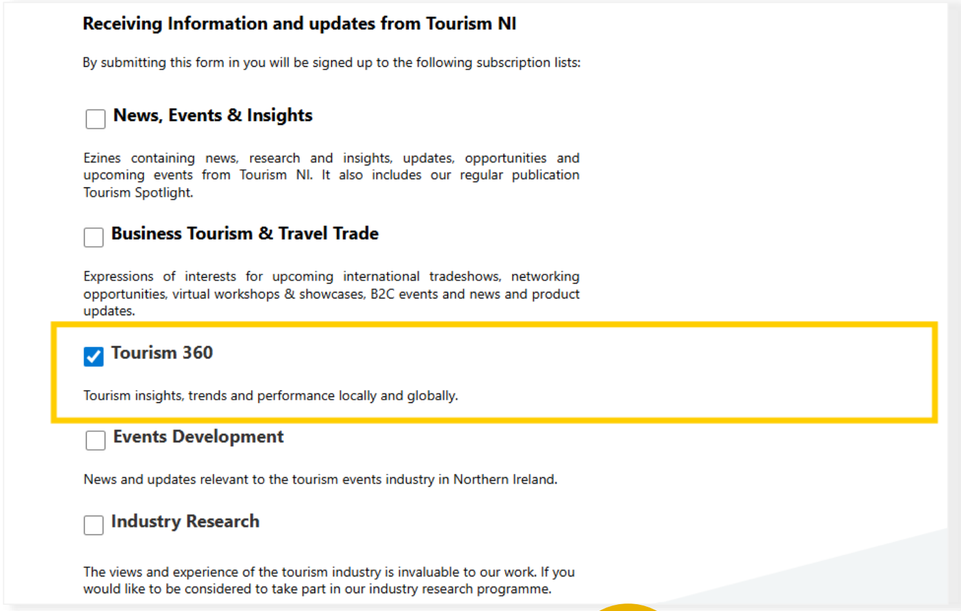
Tourism NI's Consumer Sentiment Research will provide updated insight into NI and ROI travel behaviours, propensity to travel, consumer confidence and key concerns, helping to assess the outlook for travel demand and determine key messaging.

Early Dec

Tourism NI Industry Research:

This research monitors year-to-date business performance and outlook, current challenges and reasons for optimism to help inform the tourism picture and industry needs.

Tourism 360° – Mailing List



Receiving Information and updates from Tourism NI

By submitting this form in you will be signed up to the following subscription lists:

☐ **News, Events & Insights**

Ezines containing news, research and insights, updates, opportunities and upcoming events from Tourism NI. It also includes our regular publication Tourism Spotlight.

☐ **Business Tourism & Travel Trade**

Expressions of interests for upcoming international tradeshows, networking opportunities, virtual workshops & showcases, B2C events and news and product updates.

☑ **Tourism 360**

Tourism insights, trends and performance locally and globally.

☐ **Events Development**

News and updates relevant to the tourism events industry in Northern Ireland.

☐ **Industry Research**

The views and experience of the tourism industry is invaluable to our work. If you would like to be considered to take part in our industry research programme.

Click here to sign up.

To ensure you stay informed on the latest tourism performance statistics, consumer and industry research and insights, join our Tourism 360° mailing list by completing this newsletter sign up form and selecting 'Tourism 360' (as shown above) along with any other information you may be interested in.



This report was produced in October 2026 by

Tourism NI's Insights & Intelligence Service.

TOURISM
NORTHERN
IRELAND