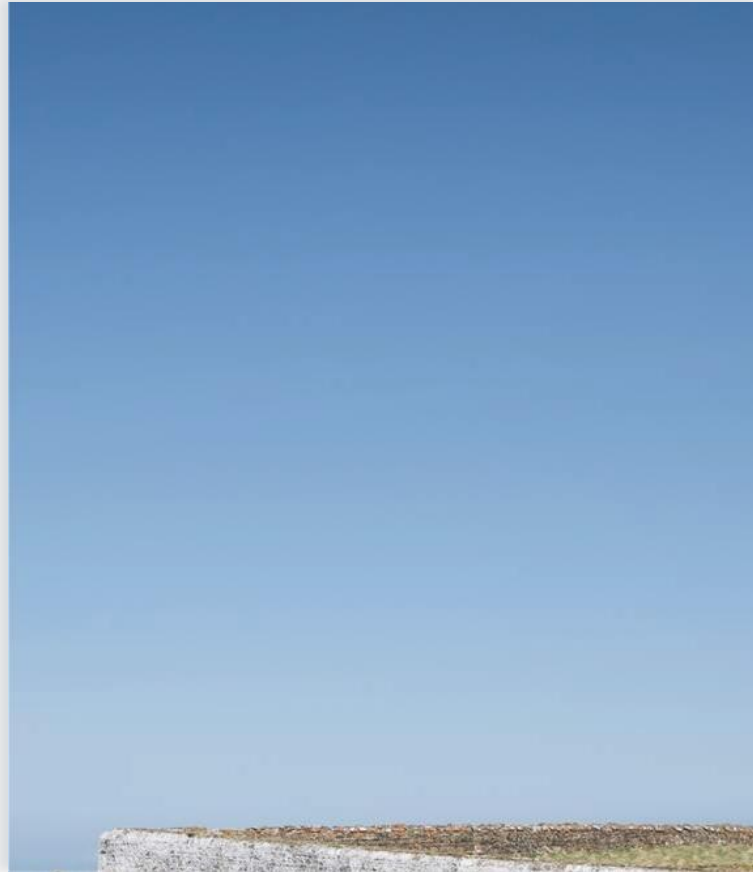




TOURISM
NORTHERN
IRELAND

TOURISM 360°

Performance Update – September 2025



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Summary

Available data indicate a mixed tourism performance during the first six months of 2025. Hotel room sales declined compared to the same period in 2024, while self-catering reserved nights have grown, and average daily rates increased for both sectors. Online review analysis suggests that NI's accommodation continues to offer a highly positive visitor experience, scoring slightly better than competitor destinations.

Air and sea passengers flowing through NI have both seen small increases in the first half of the year, while tourism related cardholder spend in NI remained on par with January-June 2024.

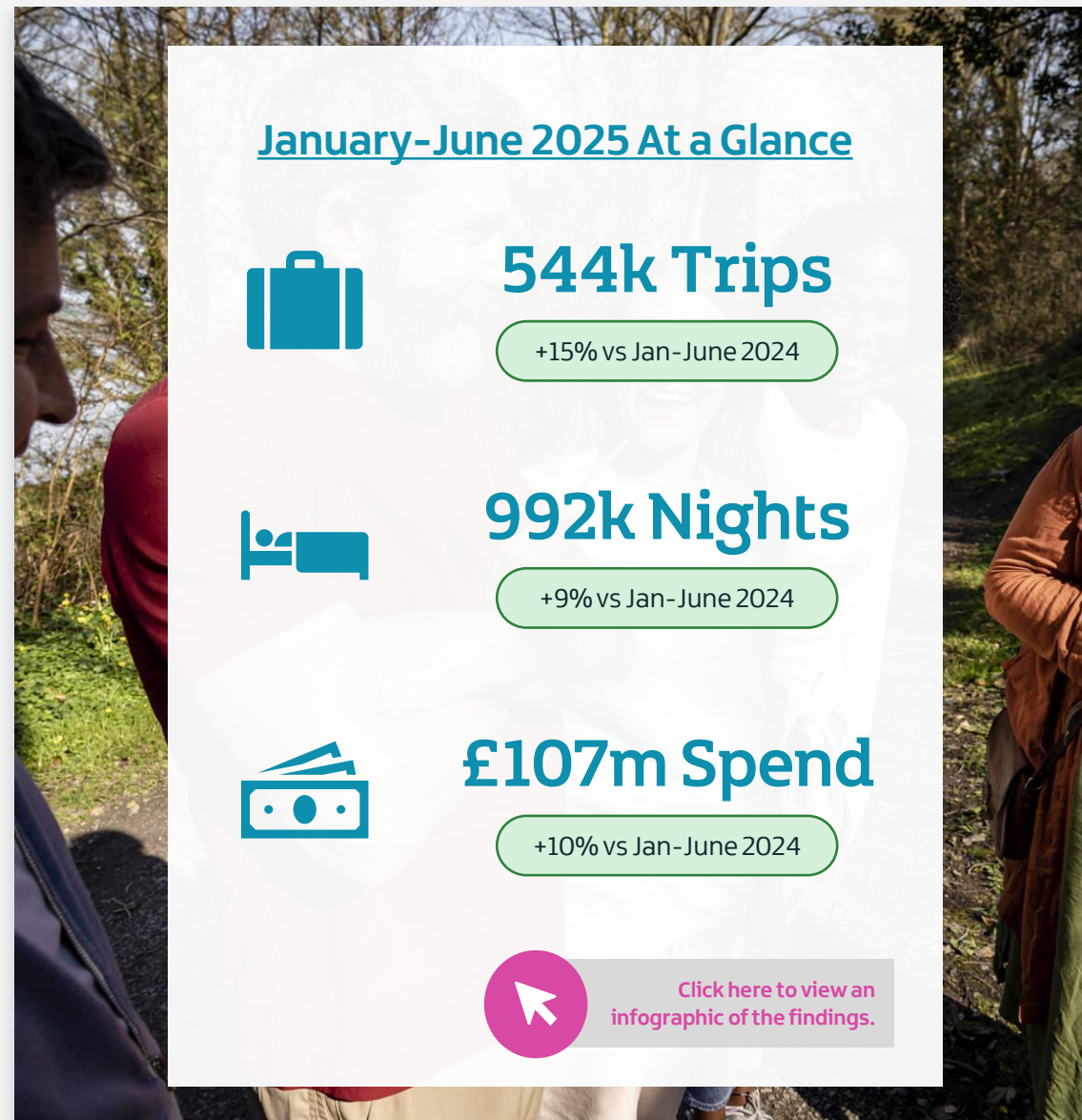
Consumer confidence in the UK and Republic of Ireland (ROI) has improved in recent months, following declines earlier in the year. Despite cost-of-living concerns, travel remains a priority for consumers, but value for money is on holidaymakers' minds.

Tourism NI's latest industry research indicates an optimistic outlook for the summer period, however significant levels of concern remain regarding the on-going impact of reduced consumer disposable income and general operating costs, with the high price of energy and insurance also highlighted.

The Central Statistics Office (CSO) recently published January-June 2025 results from their Household Travel Survey, including data on ROI residents' trips, nights and spend in NI. The latest figures published by the CSO indicate that there was a 15% increase in the number of overnight trips taken by ROI residents to NI in the first half of 2025 compared with the same period in 2024, and a 10% increase in spend.

Key Findings:

- The increase in trips was driven by significant growth in holiday visitors as well as strong performance by those visiting friends and relatives compared to January-June 2024.
- Conversely, there were declines in the number of domestic trips taken in ROI, by ROI residents during January-June 2025, while nights were also down and spend remained flat.
- The more positive NI performance is possibly linked to the ongoing perception amongst ROI residents (as reported in [Tourism NI's latest Consumer Sentiment Research](#)) that NI offers better value for money than ROI. Meanwhile the declines in ROI domestic performance are potentially related to the impact of cost-of-living which both Tourism NI's consumer sentiment and Credit Union Ireland's ROI Consumer Confidence Index have reported has weighed heavily on the Irish consumer in the first half of this year.
- For ROI consumers, the top motivators for taking a break in NI are fun, escapism and relaxation. Tourism NI's consumer sentiment research and analysis of online review data indicates that ROI residents had a highly positive visitor experience in NI, with our welcome and hospitality one of the highlights of their trip.



Both the hotel and self-catering accommodation sectors in NI have seen similar declines in occupancy during the first half of 2025 compared to 2024, while other KPIs suggest contrasting performance between the two sectors. Hotels have experienced a decline in room rate and room sales so far this year; while self-catering accommodation have seen increases in both metrics.

NI Hotel Performance January-June 2025

- STR report NI hotel room occupancy during January-June was 69.5%, slightly below the same period in 2024. Over 1.2m rooms have been sold in NI hotels in the first six months of 2025, down 4% on the same period last year.
- NI's year-to-date average daily rate (ADR) is marginally behind 2024 while revenue per available room (RevPAR) has seen a slightly larger decline.
- Derry~Londonderry has seen the largest decline in occupancy, followed by Belfast while Regional NI* is outperforming 2024 levels.

Room Occupancy	Change vs 2024
69.5%	-2.3pps

pps = percentage points

ADR	Change vs 2024
£110.26	-1.3%

RevPAR	Change vs 2024
£76.58	-4.5%

**Regional NI – All NI excluding Belfast & Derry~Londonderry*

NI Self-Catering Performance

January-June 2025

Occupancy	ADR	Reserved Nights
44%	£153.87	488,000
-3pps vs Jan-June 2024	+6% vs Jan-June 2024	+4% vs Jan-June 2024

- Lighthouse report NI self-catering room occupancy during January-June was 44% - a small decline compared to the first half of 2024.
- Monthly occupancy has fallen short of 2024 levels in all but one month so far this year, likely impacted by the growth in accommodation stock seen this year.
- NI's average daily rate and nights reserved during the first six months of 2025 are both showing increases compared to last year.

Monitoring of visitor experience scores for the first half of 2025 indicates that NI accommodation establishments and attractions continue to deliver an overall positive visitor experience, with scores comparable to those achieved in the same period in 2024. A further deep dive into the NI visitor accommodation experience by Local Government District (LGD) for January-June 2025 shows positive GRS scores across NI's regions.

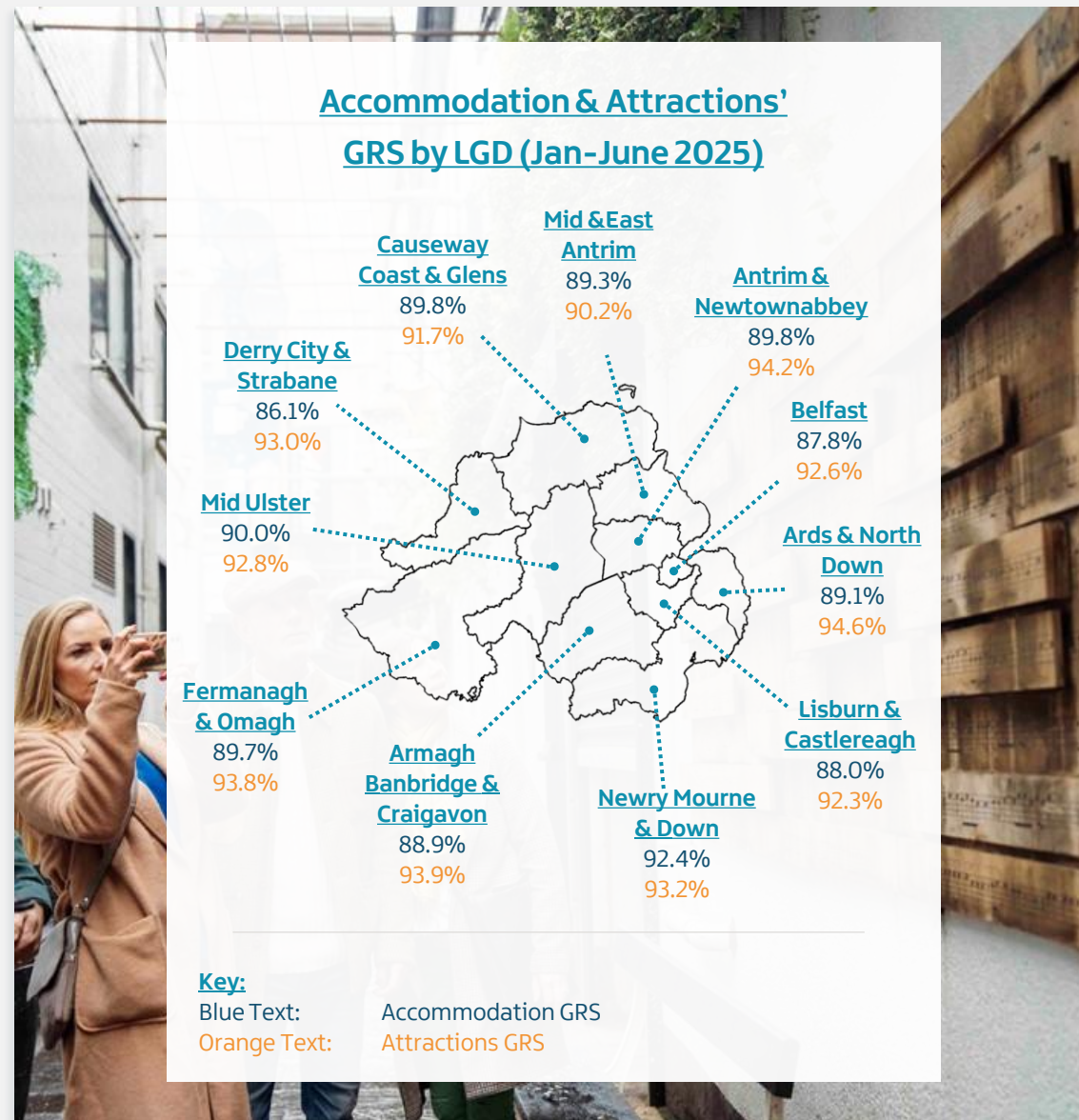
Visitor Experience January-June 2025

Global Review Score (GRS)*	
Accommodation	Attractions
89.6%	93.0%
+0.1pp vs 2024	-0.2pps vs 2024

Accommodation & Attractions

- NI's GRS score for accommodation for January-June 2025 was slightly above the score achieved by competitor regions. For attractions, NI's GRS score was slightly below the scores achieved by competitor regions.

*Global Review Score (GRS) is a key benchmarking metric for visitor experience. It is calculated by an algorithm that generates a percentage from 0-100, based on review data. The online review data analysed is collated from 175 sources.



Cardholder spend data in NI for January to June 2025 indicates that tourism-related* spend was broadly on par with the same period in 2024. For both the domestic and the ROI markets, overall tourism-related spend remained stable compared to the first half of 2024. Spend in NI from the GB market increased, while spend from overseas markets slowed vs 2024.

Cardholder Spend January-June 2025

- Overall, accommodation spend was down by 11%, with declines observed for each of our main market areas. In contrast, spend in the other two tourism-related categories - bars and eating places & restaurants - grew by 3% each.
- In the first half of the year, spend by Island of Ireland residents remained stable, with both markets seeing growth in eating places & restaurants, while spending on accommodation declined. For bars, domestic spend remained unchanged and ROI spend increased.
- The growth in GB spend in the first half of the year has been driven by increased spend in bars and eating places & restaurants.
- Following recent growth in spend from other overseas markets, tourism-related spend slowed in January-June 2025, declining by 2% compared to the same period in 2024.



*The tourism-related categories are:

- Bars/Taverns
- Eating Places & Restaurants
- Hotels/Motels/Resorts.

At A Glance

Key Tourism-Related Cardholder Spend in NI by Market: January-June 2025 vs 2024

Northern Ireland	↔
Republic of Ireland	↔
Great Britain	↑
Other Overseas	↓
All Markets	↔

Background:

The data in this report is based on transactions processed by a major card company.

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.

Civil Aviation Authority (CAA) airport data indicate that air passenger flow for NI during the first half of 2025 stood at 4.4m, up 1% on the same period in 2024. to NI during this period. The number of passengers travelling on ferries to and from NI saw a larger increase of 4% compared to the first half of 2024.


Air Passenger Flow and Scheduled Seat Capacity

- CAA airport data indicate that air passenger flow for NI during the first half of 2025 stood at 4.4m, up 1% on the same period in 2024. to NI during this period.
- 2025 year-to-date air passenger flow in both Belfast airports was broadly on par with the Jan-June 2024, while City of Derry Airport experienced growth of two-fifths.
- Belfast International Airport accounted for 72% of NI's total air passenger flow, with George Best Belfast City Airport making up approximately one-quarter of passenger flow and City of Derry making up 2%.
- In air access news, several new routes have been added at NI's airports this year including seasonal flights to Cornwall, new winter routes to Edinburgh beginning in late October 2025 and a new route between City of Derry airport and Birmingham confirmed for the end of summer.

Airport	Jan-Jun 2025	Change vs 2024
Belfast Int'l	3.2m	+1%
Belfast City	1.1m	-1%
City of Derry	104k	+40%

Sea Access – Ferry Passengers

- Data for January-June 2025 indicates that the number of passengers travelling on ferries to and from NI was up 4% compared to levels seen in 2024. For comparison, the passenger numbers travelling to and from ROI has experienced no change as the growth evident in the southern corridor has been cancelled out by a decline in passengers through the central corridor.

Corridor 	Change vs 2024
Northern Corridor <i>(GB to NI)</i>	+4%
Central Corridor <i>(Dublin & Dun Laoghaire)</i>	-5%
Southern Corridor <i>(Rosslare)</i>	+24%

Tourism NI's latest consumer sentiment research in NI and the ROI was undertaken in March 2025 with a robust, nationally representative sample from both markets (750 adults in ROI and 400 adults in NI). Findings indicated that intentions to take a trip in NI in summer 2025 remain broadly stable among ROI consumers, while NI domestic intentions see some softening. Consumers from both markets continue to view NI as offering better value for money than ROI and GB.

Key Findings

- Satisfaction with recent trips in NI remains strong for both NI and ROI consumers, with a notable increase in the proportion of consumers in both markets reporting that expectations were exceeded.
- There is increased pessimism in both markets around the cost-of-living outlook, with more consumers expecting things to get worse in the coming months.
- The range of places to eat & drink, opportunities to enjoy the outdoors and the welcome & hospitality were particularly highly rated by consumers in both markets.
- For some, this shift in sentiment is reflected in holiday planning, with an increased amount of NI consumers indicating they may not take holidays in the near future due to financial pressures.
- ROI and NI consumers continue to view NI as offering better value for money than ROI and GB, with shopping and public transport considered good value for money by both markets.
- The next wave of consumer sentiment research will be conducted in September 2025, with results available in October.

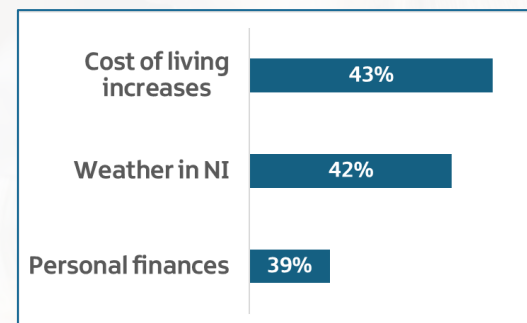


[Click here to view the full report.](#)

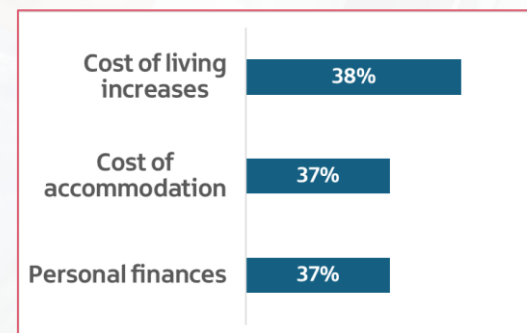
Barriers to Travel

Top 3 barriers to taking a short break or holiday in NI in the next 6 months

NI Consumers



ROI Consumers



Tourism NI commissioned a survey in June with Northern Ireland's tourism industry to monitor 2025 year-to-date (Jan–June) business performance, including outlook for the summer period, as well as causes of concern and reasons to be optimistic. The research indicates a generally positive industry performance during January–June 2025.

Key Findings

- Around three-quarters of respondents reported business was up or on par with the first half of last year, while a substantial proportion (one-quarter) reported a decline in visitor volumes.
- Significant levels of concern prevail regarding the on-going impact of reduced consumer disposable income and general operating costs, with energy and insurance costs also highlighted.
- Other key concerns related to increased competition, including more people going abroad.
- Close to 3 in 10 businesses employing staff were experiencing difficulties in relation to staff recruitment. This represents an increase in the proportion of businesses experiencing similar challenges when compared with our October 2024 survey.
- Outlook for the summer period was largely optimistic, with the continued success of repeat visitors, a strong domestic market and the positive impact of local festivals and events were most likely to be highlighted as reasons to be positive for the remainder of the year.



[Click here to view the full report.](#)

Reasons to be Positive

Q. Are there any particular reasons to be positive about business for the remainder of the year?



The UK Consumer Confidence Barometer is conducted by GfK and reports on consumer confidence against five measures including personal finance, general economic situations and major purchase index. The ROI Consumer Sentiment Index is conducted by the Irish League of Credit Unions and reports on consumer confidence against seven measures including conditions, expectations and economic outlook.

UK Consumer Confidence



UK Index Score August 2024 – August 2025

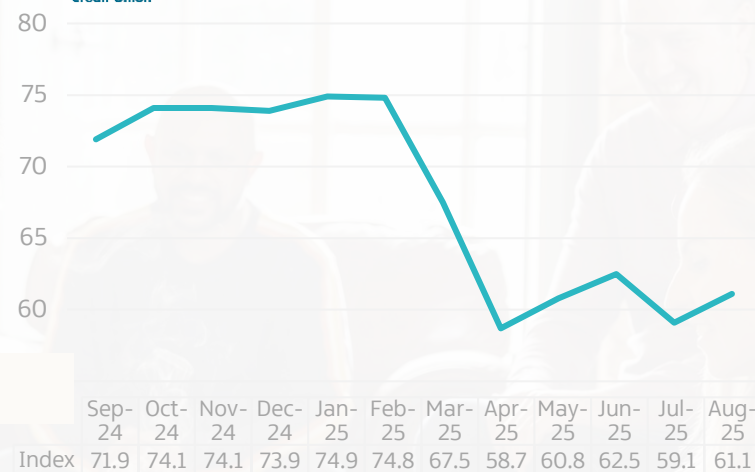


- GfK's long-running UK Consumer Confidence Index increased by two points to -17 in August. The biggest changes in August were in confidence in personal finances, with the scores looking back and ahead a year each up by three points. This is likely due to the Bank of England's August 7th cut in interest rates, delivering the lowest cost of borrowing for more than two years.

ROI Consumer Confidence



Index Score August 2024 - August 2025



- Credit Union's ROI Consumer Confidence Index rose from 59.1 in July 2025 to 61.1 in August 2025.
- Irish consumer confidence improved slightly in August as the US-EU tariff deal reduced uncertainty about the economic outlook. However, rising grocery prices and back-to-school costs prompted a small further weakening in sentiment around household finances.

Figures released by the Northern Ireland Statistics and Research Agency (NISRA) indicate there were over 926,000 overnight trips taken in NI in the first quarter of 2025, accounting for 2.6m nights and £207m expenditure. Findings broadly align with the declines seen in hotel and small sector accommodation room occupancy and sales, as well as the drop in cardholder spend on NI accommodation during January-March 2025.

NI Tourism Performance: January-March 2025

	Jan-Mar 2025	Change vs Q1 2024
Trips	926k	On Par
Nights	2.6m	-13%
Spend	£207m	-7%

- [NISRA statistics](#) indicate that overnight trips taken in NI during the first quarter of 2025 were on par with 2024 while nights, and spend on overnight trips in NI, both experienced declines.
- Holiday trips were the most popular reason for visiting NI during the first three months of 2025, however overall holiday visitors declined

compared to the same period last year. Those visiting friends and relatives saw the largest increase in Q1 2025, followed by business trips.

- The figures indicate a positive performance in the first quarter of 2025 from the ROI and GB markets, with increases from these markets offsetting the declines from Domestic and Other Overseas visitors.
- This is the first tourism performance statistics release since the full year 2024 figures were published. A full suite of reports on the 2024 data can be viewed [here on TourismNI.com](#).

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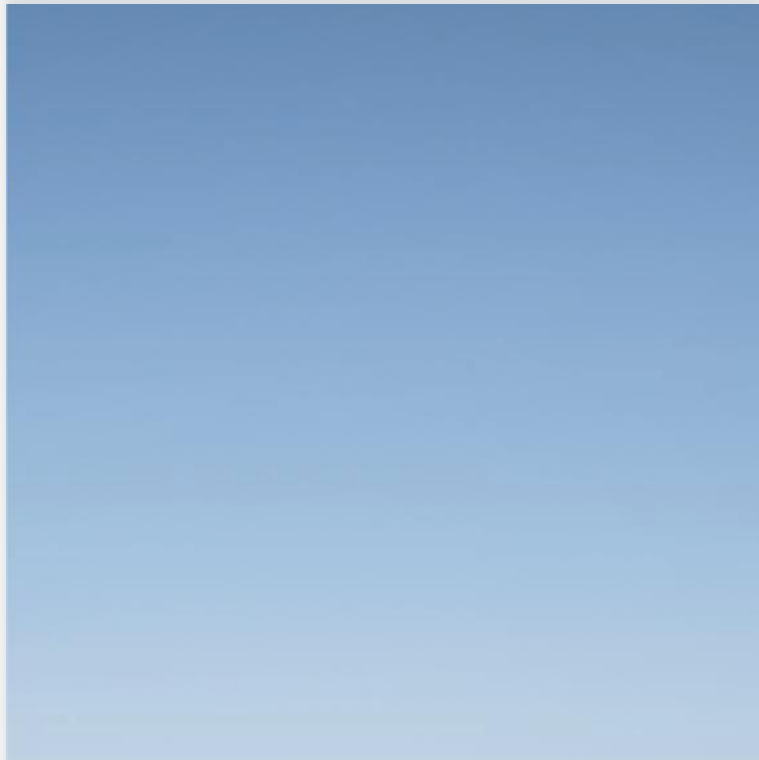
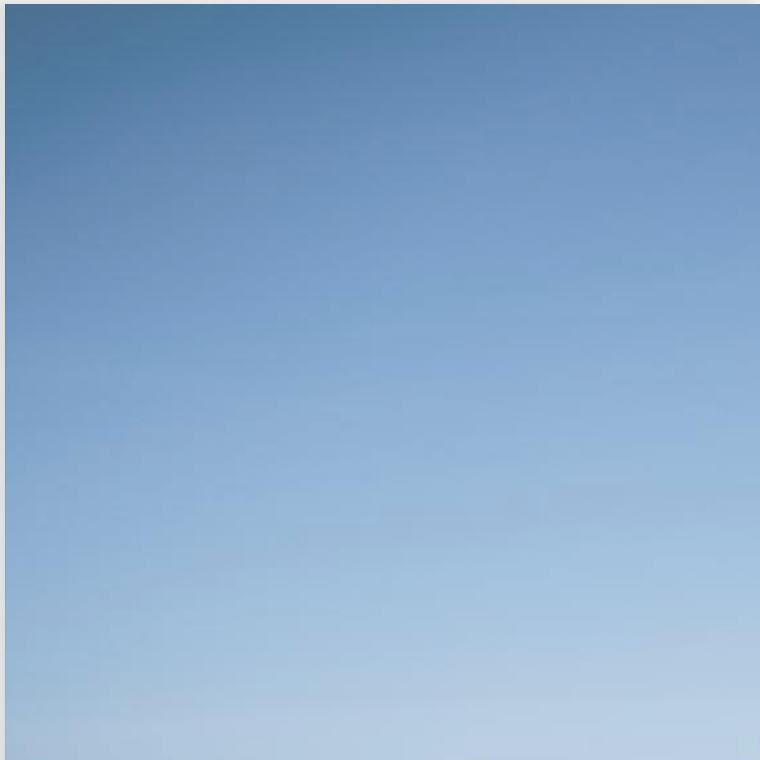
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The views and experience of the tourism industry is invaluable to our work. If you would like to be considered to take part in our industry research programme.

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This report was produced in September 2025 by Tourism NI's Insights & Intelligence Service.

