

TOURISM 360°

Performance Update – March 2026

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Summary

Available data suggest a broadly stable Northern Ireland (NI) tourism performance in 2025, but with increased visitor spend. Hotel occupancy and room sales softened slightly while ADR stayed above 2024 levels.

Performance to date for 2026 is encouraging, with hotels recording strong sales and healthy rates. Attraction performance in January was mixed, with outdoor sites affected by exceptional rainfall. Forward bookings show modestly improved occupancy for hotels.

Trip intentions strengthened for NI residents and remained stable in the Republic of Ireland (ROI) and overseas markets. Consumer confidence has declined as households braced for rising costs and a more uncertain economic outlook linked to the conflict in the Middle East.

NISRA Performance Statistics

Overnight trips and spend grew by **6%** and **11%** respectively on the first nine months of 2024, while nights saw a smaller increase of just 1%.

The growth in trips was largely driven by **ROI and GB**, with positive performances from these markets during January-September 2025 offsetting declines from Domestic and Other Overseas visitors.

Day trip performance in the 12 months to September 2025 experienced strong growth of almost two-fifths, with the number of domestic day trips and associated expenditure increasing by 46% and 33% respectively.



3.9m
Trips

+6% vs Jan-Sept 2024



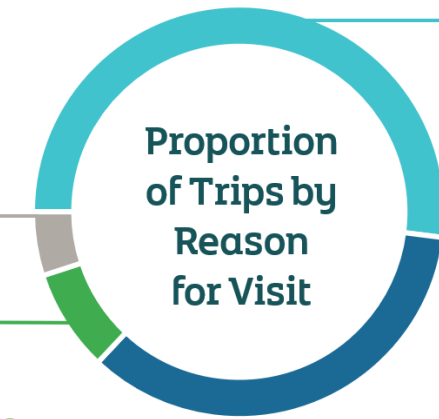
12.1m
Nights

+1% vs Jan-Sept 2024



£918m
Spend

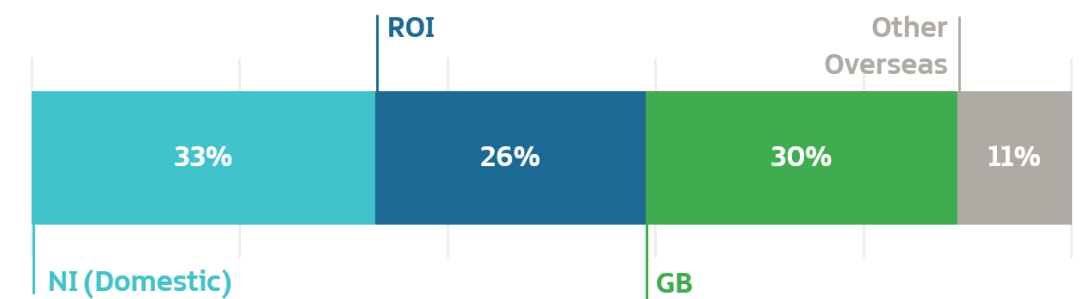
+11% vs Jan-Sept 2024



Number of Trips by Reason for Visit vs Jan-Sept 2024

Reason for Visit	Change vs Jan-Sept 2024
Holiday	+3%
VFR	+8%
Business	+12%
Other	+16%

Proportion of Trips by Market



Number of Trips by Market vs Jan-Sept 2024

Market	Change vs Jan-Sept 2024
NI	-2%
ROI	+30%
GB	+4%
Other	-6%

Average Length of Stay

3.1 Nights

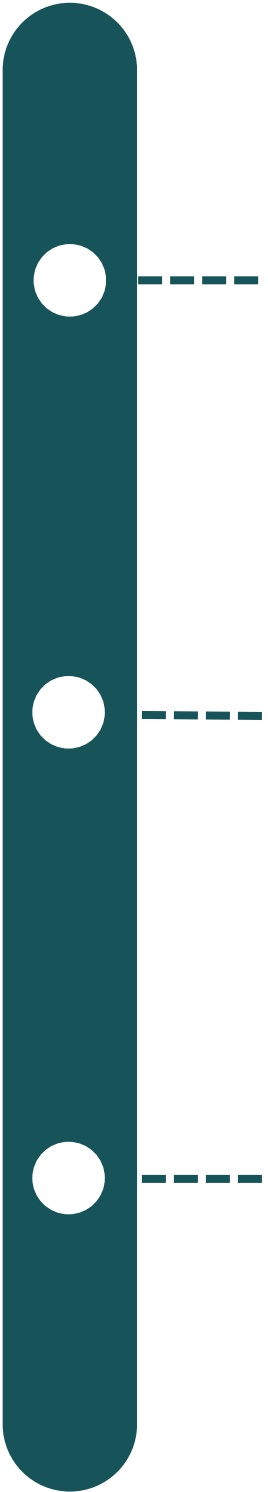
On Par with Jan-Sept 2024

Average Spend per Trip

£236.91

+4% vs Jan-Sept 2024

2025 ROI to NI Overnight Trips



A strong ROI to NI performance was evident in 2025, with all key performance metrics showing increases compared to 2024.

In contrast, ROI domestic trips and nights declined, possibly linked to the ongoing perception amongst ROI residents that NI offers better value for money than ROI and GB, as well as memorable experiences.

Tourism NI's research and other indicators report that the impact of cost-of-living weighed heavily on the Irish consumer in 2025.



1.3m
Trips

+15% vs Jan-Dec 2024



2.7m
Nights

+9% vs Jan-Dec 2024

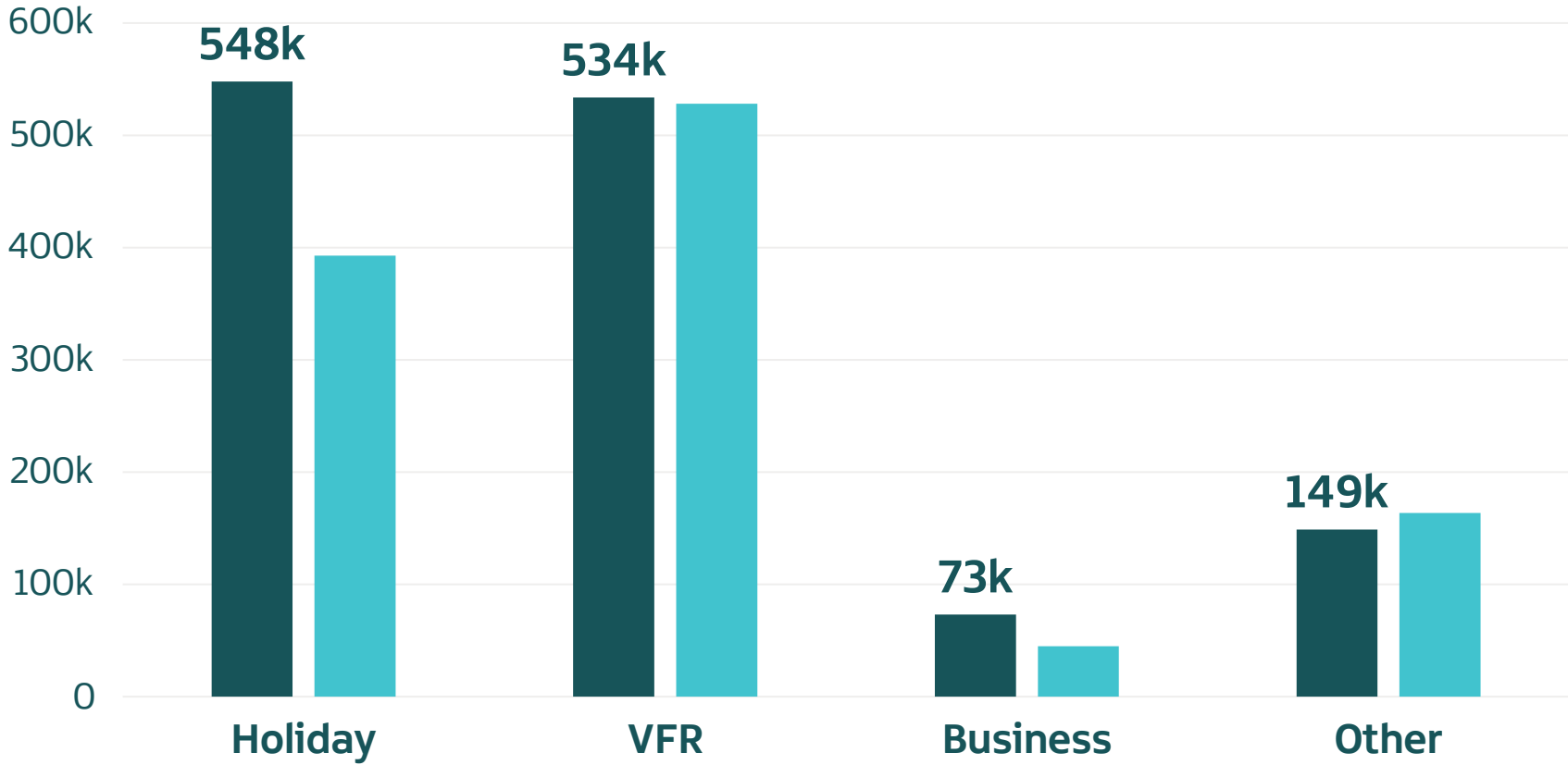


£317m
Spend

+31% vs Jan-Dec 2024

ROI Overnight Trips to NI

2025 vs 2024



NI Hotel Performance

During January-December 2025, **NI hotel room occupancy fell** by 1.3 percentage points, and NI room sales finished the year 2% lower than 2024 levels.

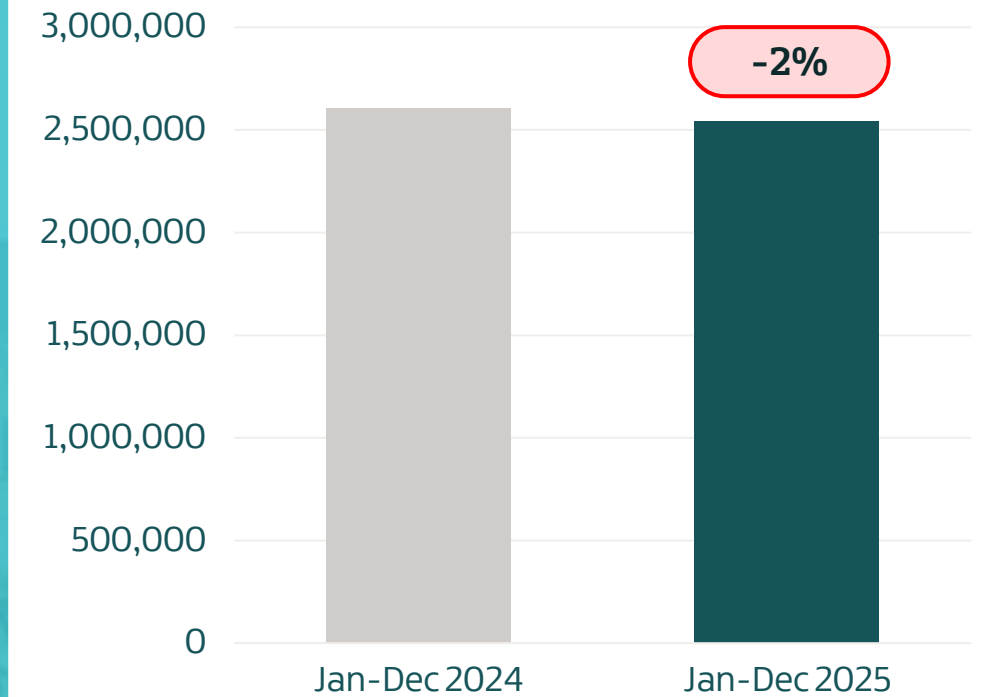
NI's **average daily rate (ADR) remained ahead of January-December 2024**, while Revenue per Available Room (RevPAR) was on par.

NI's hotel sector has **seen a positive start to 2026**, with year-to-date performance data indicating an increase in all metrics compared to 2025. Occupancy increased by 1.2pps, with growth in Belfast and Regional NI cancelling out the decline in Derry~Londonderry. NI room sales grew by 3%. This positive picture overall is largely driven by a strong January 2026.

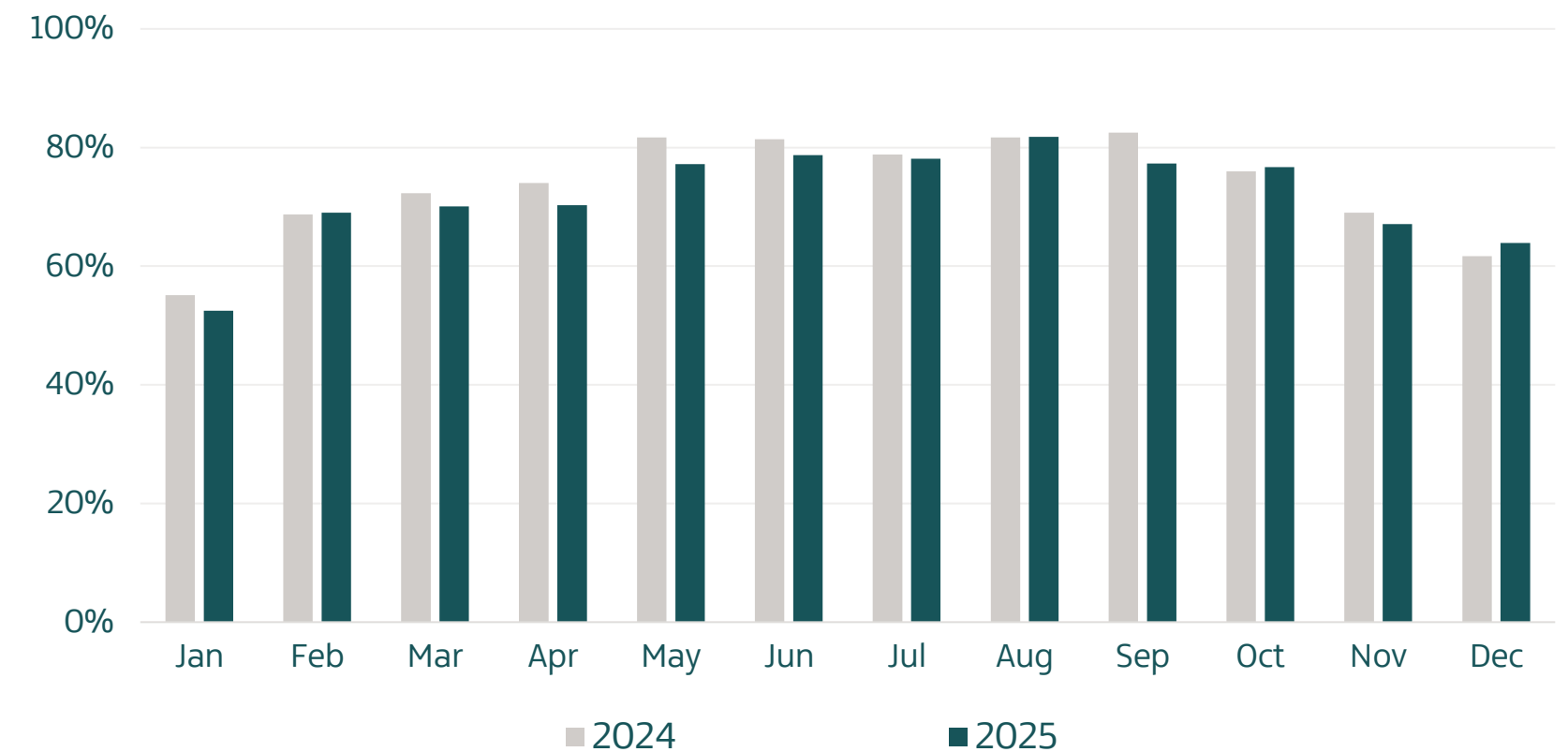
Key Metrics Jan-Dec 2025 v Jan-Dec 2024

Room Occupancy	Change vs 2024
73.2%	-1.3pps
<i>pps = percentage points</i>	
ADR	Change vs 2024
£117.32	+2.2%
RevPAR	Change vs 2024
£85.88	-0.3%
Room Sales	Change vs 2024
2.1m	-3.0%

Room Sales Jan-Dec 2025 v Jan-Dec 2024



NI Room Occupancy by Month vs previous year



Cardholder Spend

- Overall tourism-related **cardholder spend in NI during January-December 2025 grew by 2%**, driven by increases in bars and eating places/restaurants, while accommodation spend declined.
- Tourism-related categories analysed are Bars, Eating Places/Restaurants and Hotels/Motels/Resorts.
- In 2025, the **US market accounted for 63% of 'other overseas' tourism-related spend**, on a par with 2024.

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

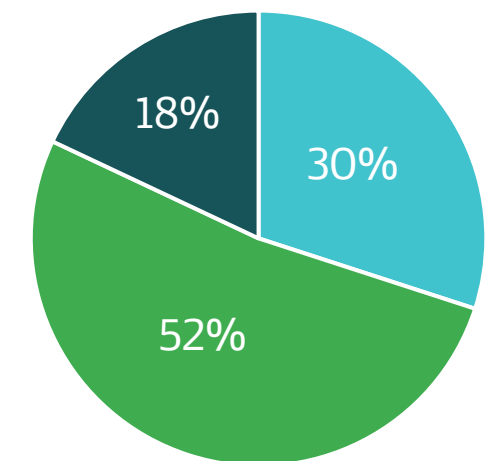
(Jan-Dec 2025 vs 2024)



Tourism-related category	All-market spend (Jan-Dec 2025 vs 2024)
Eating Places/ Restaurants	+4%
Bars	+2%
Accommodation	-2%

Spend by tourism-related category

(Jan-Dec 2025)



- Bars
- Eating Places/Restaurants
- Accommodation

Air & Sea Access

Civil Aviation Authority (CAA) airport data show that **air passenger flow for NI in 2025 stood at 9.3million**, broadly on par with 2024. Passenger numbers through both Belfast airports saw minor declines vs 2024, while City of Derry Airport saw passenger flow increase by almost one-quarter.

Ferry data for 2025 indicates that the **number of passengers travelling on ferries to and from NI experienced a minor increase (1%)** vs 2024. For comparison, passenger numbers travelling to and from ROI in 2025 increased by 3%, driven by similar growth in both the central and southern corridors.

Air Access – Passenger Flow through NI’s Main Airports

Total NI Air Passenger Flow in 2025

9.3m
Passengers

On par with 2024



Belfast International

-1%

George Best Belfast City

-1%

City of Derry

+23%

Jan-Dec 2025 vs Jan-Dec 2024

Sea Access – Ferry Passengers and Scheduled Cruise Ships

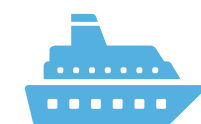
Ferry Passengers to/from NI



+1%

Jan-Dec 2025 vs Jan-Dec 2024

Ferry Passengers to/from ROI



+3%

Jan-Dec 2026 vs Jan-Dec 2025

Online Hotel Reviews

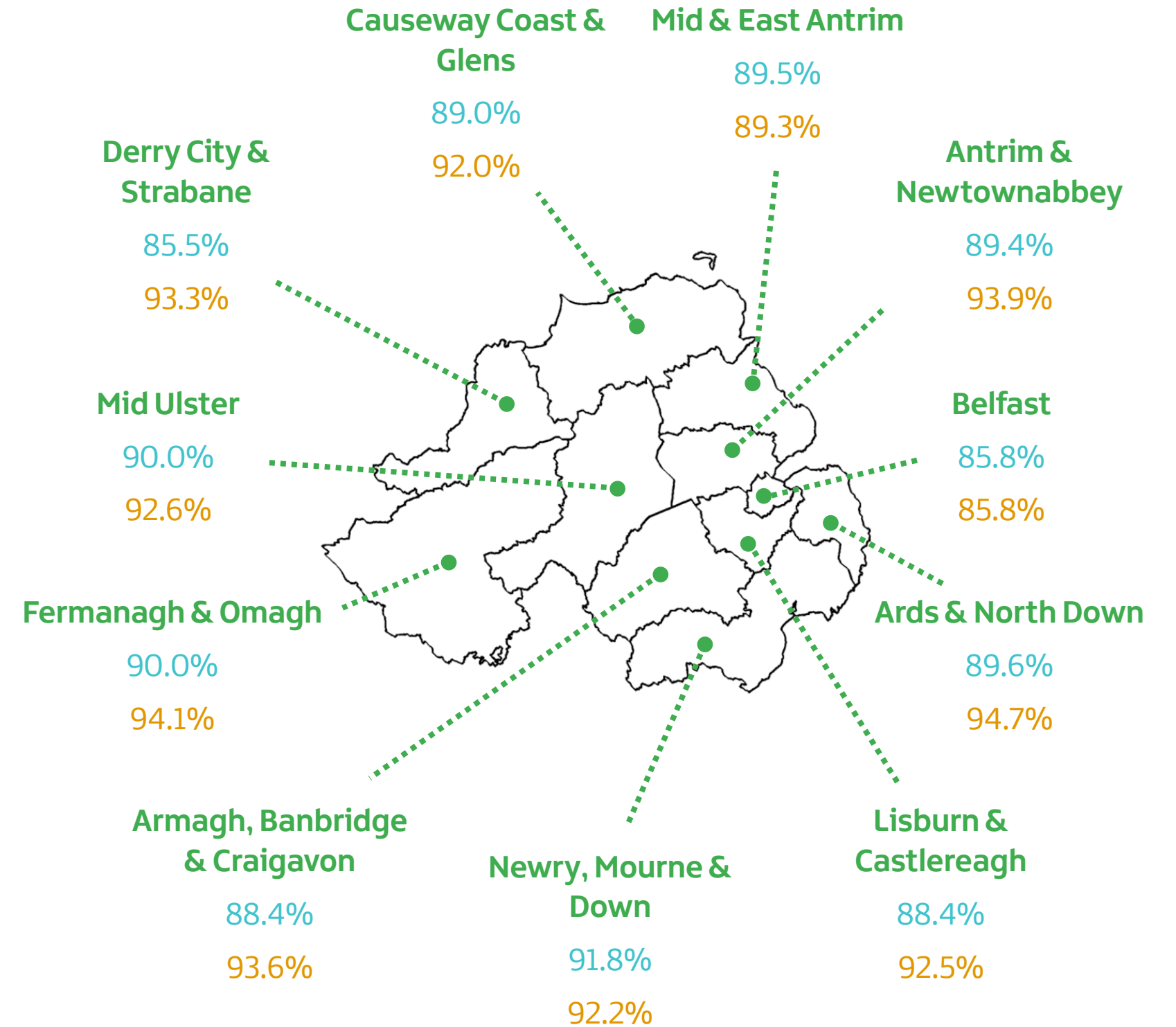
Global Review Score (GRS)*	
Accommodation	Attractions
89.4%	93.0%
+0.1pp vs 2024	-0.1pp vs 2024

Monitoring of visitor experience scores during 2025 indicates that NI accommodation establishments and attractions **continued 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 accommodation and attraction experience by Local Government District (LGD) for January-December 2025 shows positive GRS scores across NI's 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.*

Accommodation & Attractions' GRS by LGD (Jan-Dec 2025)



Key:

Blue Text: Accommodation GRS

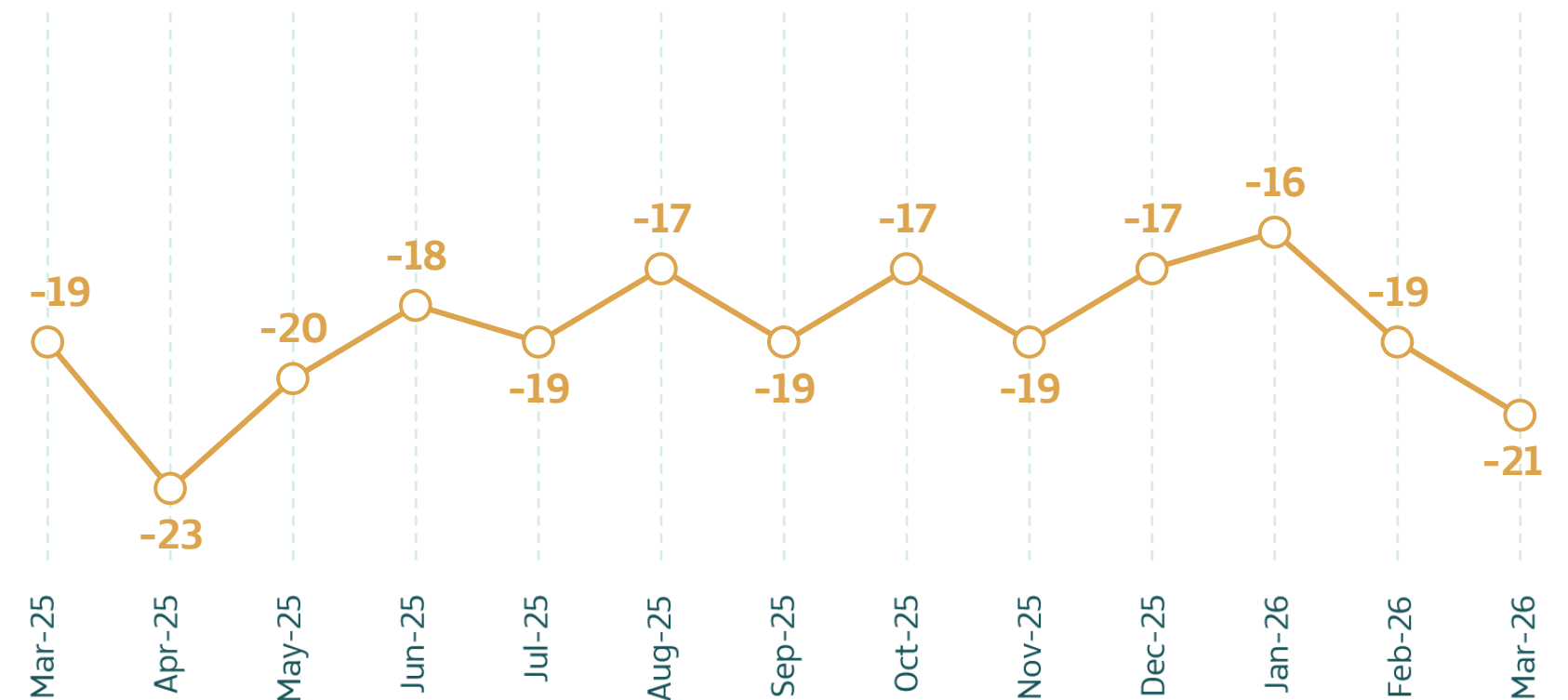
Orange Text: Attractions GRS

Consumer Confidence

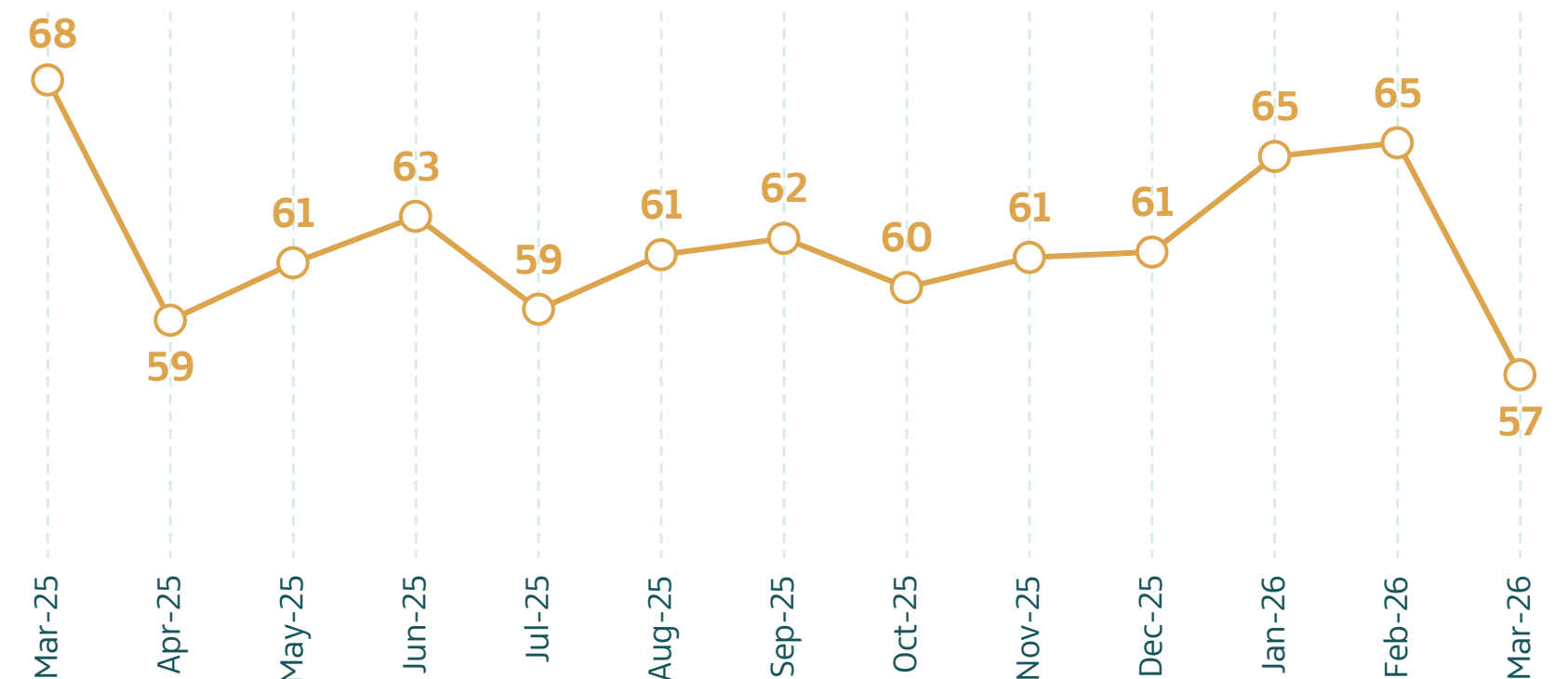
GfK's UK Consumer Confidence Index was down two points to -21 in March as rising instability in the Middle East has triggered concern amongst consumers. Households are prioritising savings amid fears of further price hikes and the economic outlook remains fragile. Preventing a deeper downturn will require balanced policy responses and swift government intervention.

Irish consumer sentiment suffered a substantial but not surprising fall in March to its weakest level in three years. The scale of the drop in the sentiment index between February and March is broadly similar to that seen in the wake of the announcement of increased US tariffs last April.

GfK - UK Consumer Confidence Index



Credit Union IE - Irish Consumer Confidence Index

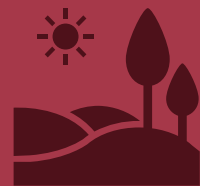


Overseas Consumer Research



Tourism Ireland conducted a survey with 8,000+ potential holidaymakers in Nov/Dec 2025 across eight markets (Great Britain, United States, Germany, France, Italy, Spain, Canada and the Netherlands) about their perceptions of the island of Ireland.

Key Findings:



Beautiful landscapes remain the top reason to visit NI.



The top barrier to taking an NI trip is **limited interest/appeal**, followed by other places on the list.



Just over half (52%) perceive NI as a sustainable destination, ahead of England (50%), but Ireland & Scotland (both 59%).



Perceptions of NI being **less easy to access and navigate** than competitor destinations limit consideration.



NI value for money perceptions are stable. Those who have previously visited report stronger impressions, reinforcing the value of delivering high-quality visitor experiences that translate into advocacy.



While **hotels attract the highest consideration overall**, **B&Bs, guesthouses and rental properties play a significant role** – particularly for countryside breaks and longer holidays.



Food quality is increasingly influencing destination choice. NI is well positioned to benefit from demand for **authentic pubs, seafood, and local produce**, with opportunities to further grow awareness.



Digital platforms, search and social media remain central to trip planning, underscoring the need for **strong visibility and compelling storytelling** to elevate NI's appeal.

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Tourism 360

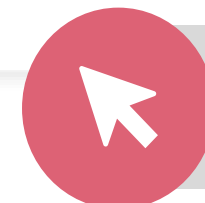
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The views and experience of the tourism industry is invaluable to our work. If you would like to be considered to take part in our industry research programme.



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This report was produced in April 2026 by
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