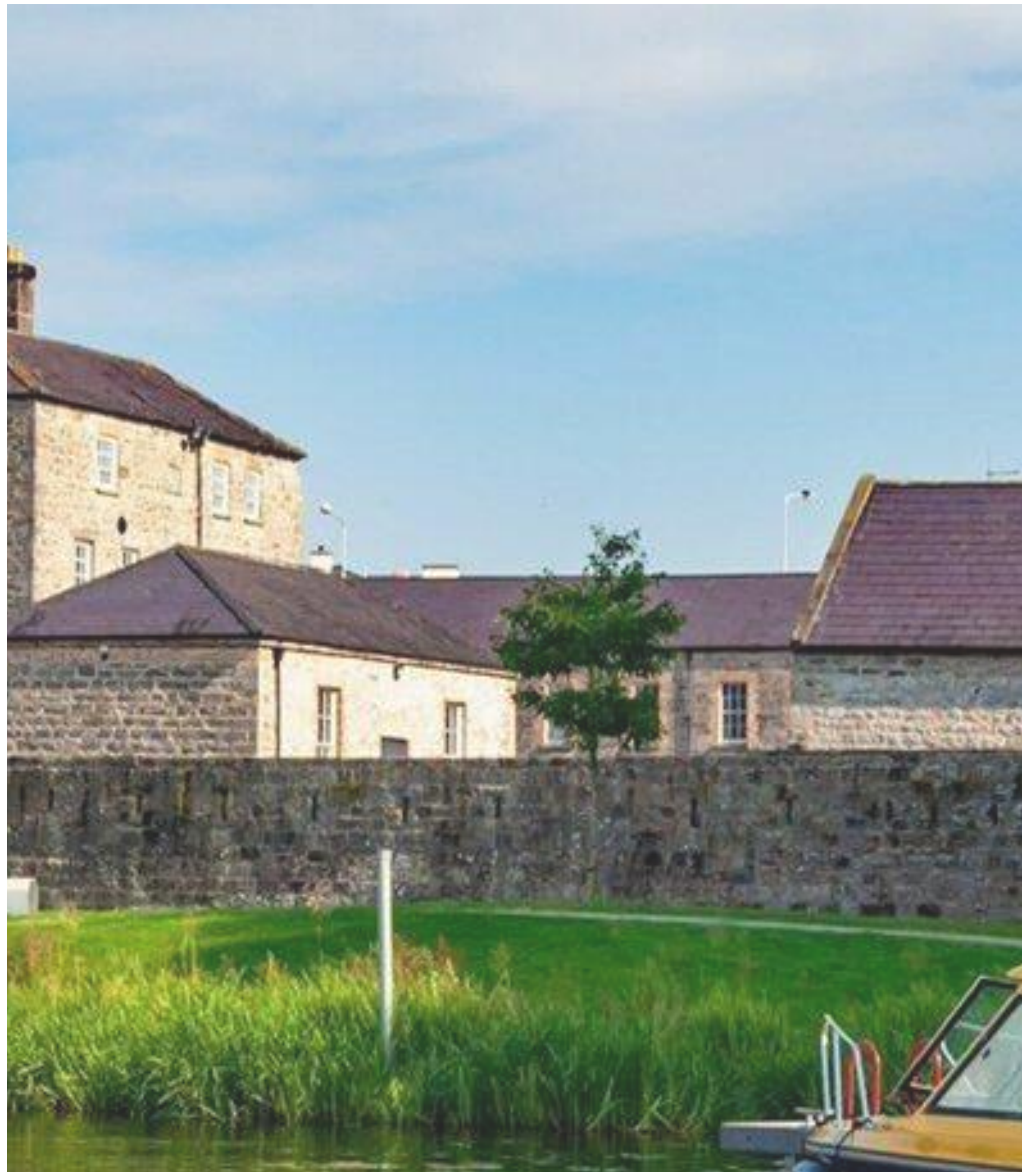
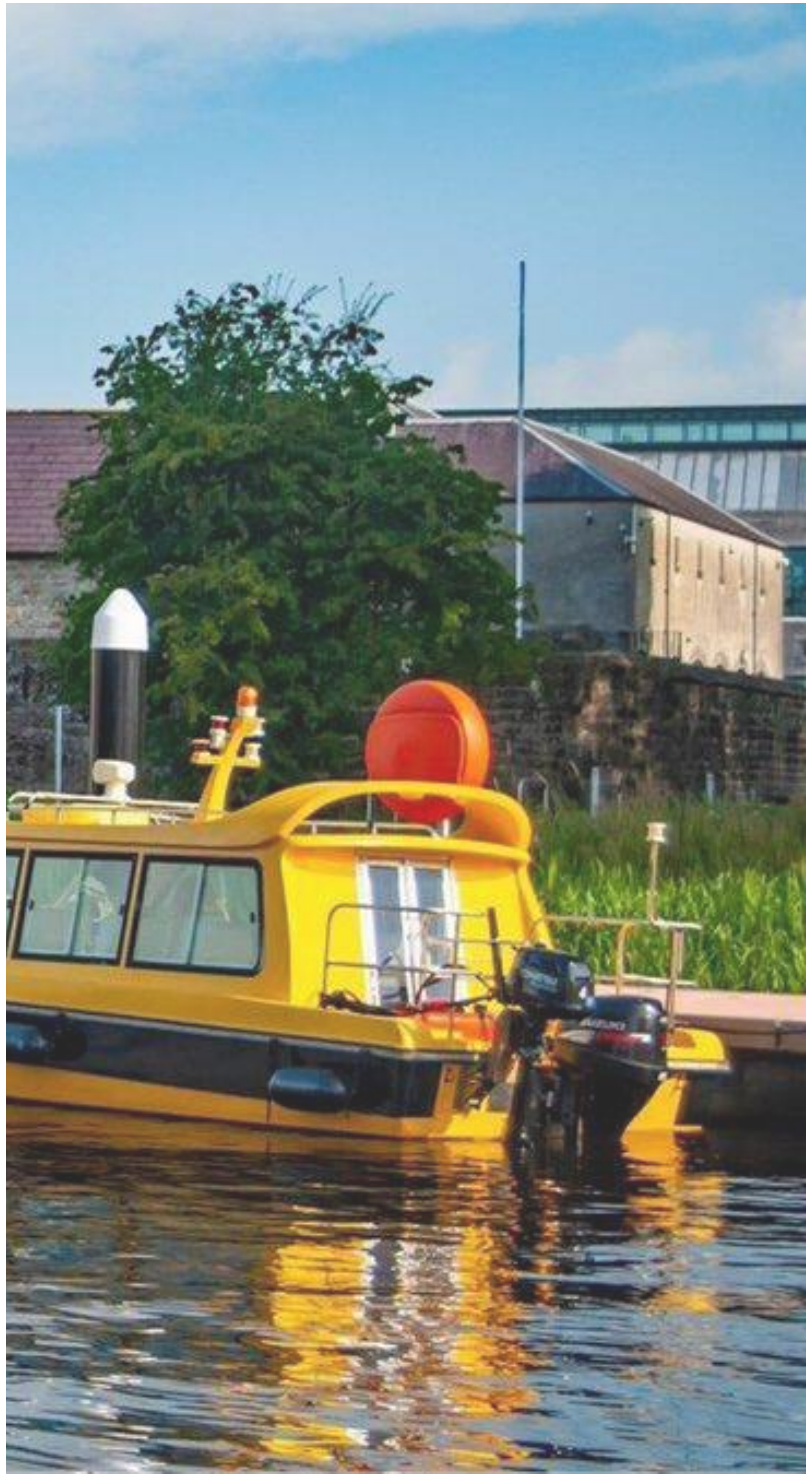




TOURISM NORTHERN IRELAND

TOURISM 360°

Performance Update – July 2026

Contents

Summary

Northern Ireland's performance in 2026 remains encouraging, with solid early-year momentum. Hotel sales and room rates have been strong, supported by resilient cardholder spend and sustained visitor demand. The visitor experience remains a key strength, with sentiment positive and consumer confidence improving, though still fragile.

Some sectors, including attractions, have faced a mixed trading environment, while broader cost and confidence pressures continue to impact businesses. Economic and geopolitical uncertainty and shifting consumer priorities towards closer-to-home, value destinations, present both opportunities and threats.

Forward hotel bookings suggest some moderation in short-term momentum, but NI travel intentions and broader European demand remain resilient. Key events, including the Fleadh Cheoil, alongside temporary reduced VAT rates over the summer for some sectors, support a constructive outlook.

NISRA Performance Statistics

Data released by the Northern Ireland Statistics and Research Agency (NISRA) for January to December 2025 indicate **strong growth in overnight tourism performance, driven largely by island of Ireland markets**.

Overall, increases are evident for trips and expenditure, alongside more modest growth in nights. Holiday and business trips experienced the largest increases, with those visiting friends/relatives similar to 2024 levels.

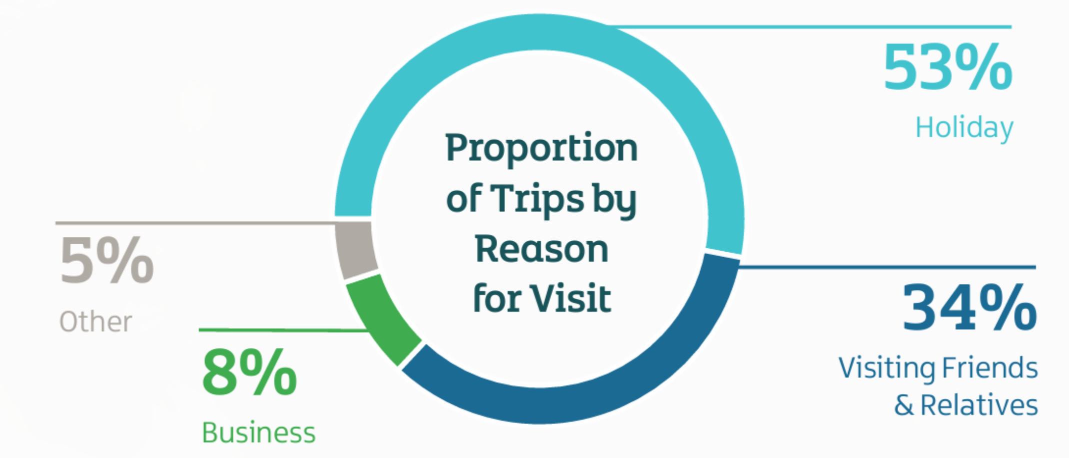
There were over 17.5 million same day trips taken in Northern Ireland in 2025, representing a significant increase on last year. Predictably, the domestic market accounted for the vast majority of same day visits, with ROI residents making up 10%.

Source: NISRA

5.1m Overnight Trips
+9% vs 2024

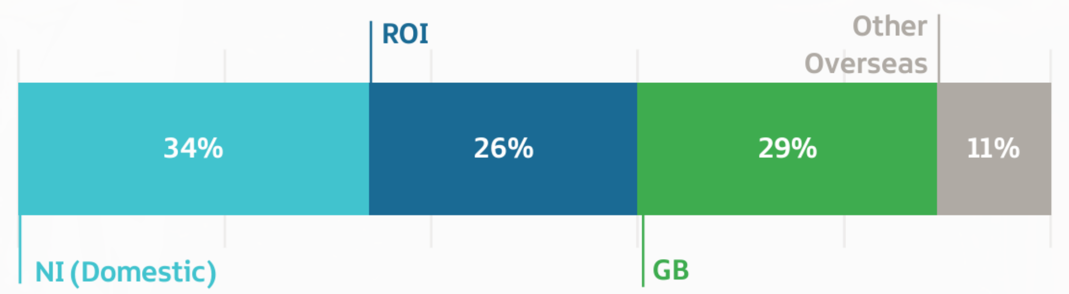
15.0m Nights
+1% vs 2024

£1.2bn Spend
+9% vs 2024



Number of Trips by Reason for Visit vs 2024	Holiday	VFR	Business	Other
	+13%	+1%	+14%	+9%

Proportion of Trips by Market



Number of Trips by Market vs 2024	NI	ROI	GB	Other
	+12%	+15%	+4%	-2%

Average Length of Stay
2.9 Nights
-0.2 nights vs 2024

Average Spend per Trip
£234.18
+1% vs 2024

Local Government District Statistics

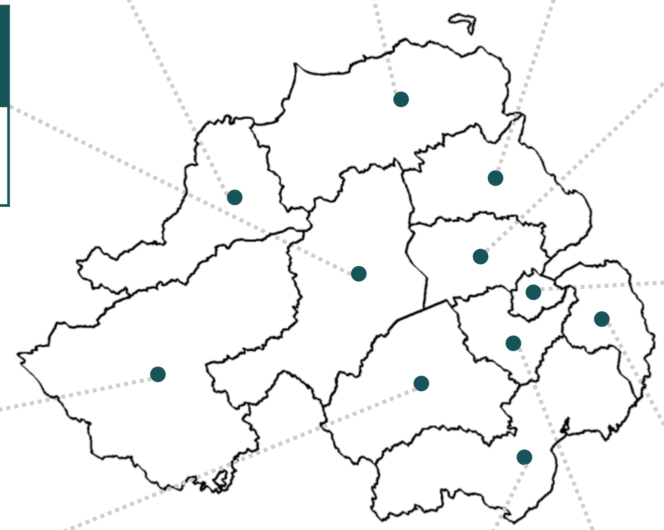
NISRA released a breakdown of 2025 NI tourism performance by Local Government District (LGD).

Belfast had the highest spend per trip of all NI's LGDs, while Mid & East Antrim had the highest spend per night. Armagh, Banbridge and Craigavon had the longest average length of stay at 5.1 nights.

The proportion of overnight trips taken outside Belfast in 2025 was on par with 2024.

The data for VAT and/or PAYE Tourism Businesses Operating in NI in 2025 indicates that 77% of businesses are based outside of Belfast.

Proportion of Overall NI Trips (left) and Spend (right)



Causeway Coast & Glens	23%	15%
Mid & East Antrim	5%	7%
Derry City & Strabane	8%	8%
Antrim & Newtownabbey	4%	4%
Mid Ulster	3%	3%
Belfast	30%	41%
Fermanagh & Omagh	8%	8%
Ards & North Down	6%	5%
Armagh, Banbridge & Craigavon	3%	2%
Lisburn & Castlereagh	2%	2%
Newry, Mourne & Down	8%	5%

Click here to view the 2025 Tourism Performance Statistics on NISRA's website.

Source: NISRA - NISRA advise against comparing LGD figures with previous years' figures.

NI Hotel Performance

NI's hotel performance during January-April 2026 reports **growth in room occupancy, with a strong Belfast performance cancelling out declines in Derry~Londonderry, and Regional NI remaining flat**.

NI's year-to-date average daily rate (ADR) for January-April 2026 is broadly on par with the same period last year, while higher occupancy levels lifted revenue per available room (RevPAR).

Room sales increased **5.1%** versus January–April 2025, confirming a stronger start to the year and a firmer base heading into the peak season.

Source: STR

NI Jan-April 2026 KPIs vs previous year

Room Occupancy	Change vs 2025
66.6%	+1.7pps

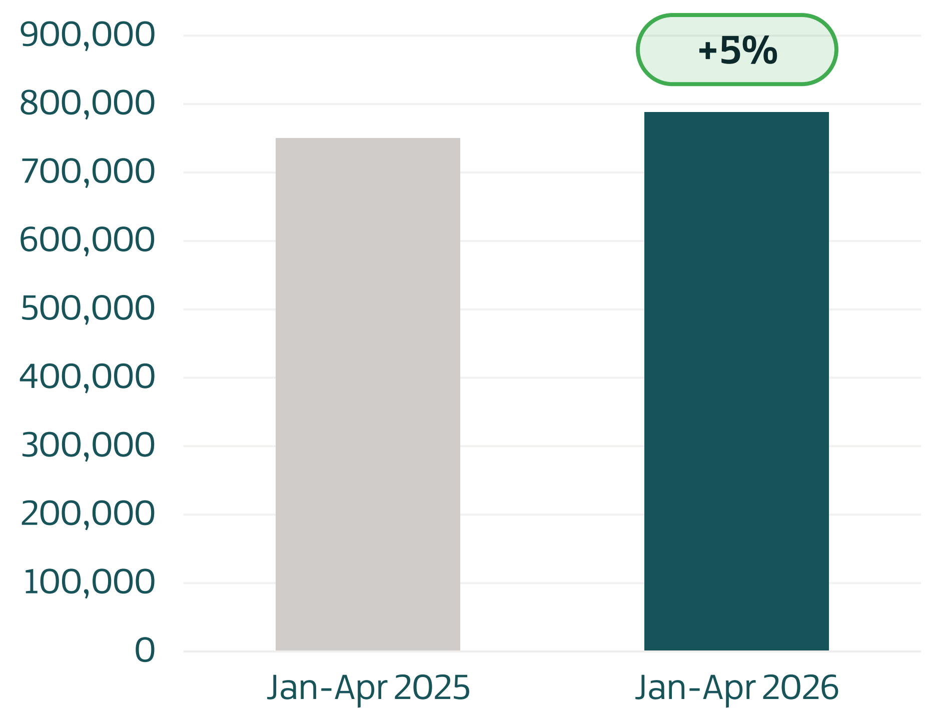
pps = percentage points

ADR	Change vs 2025
£103.58	+0.4%

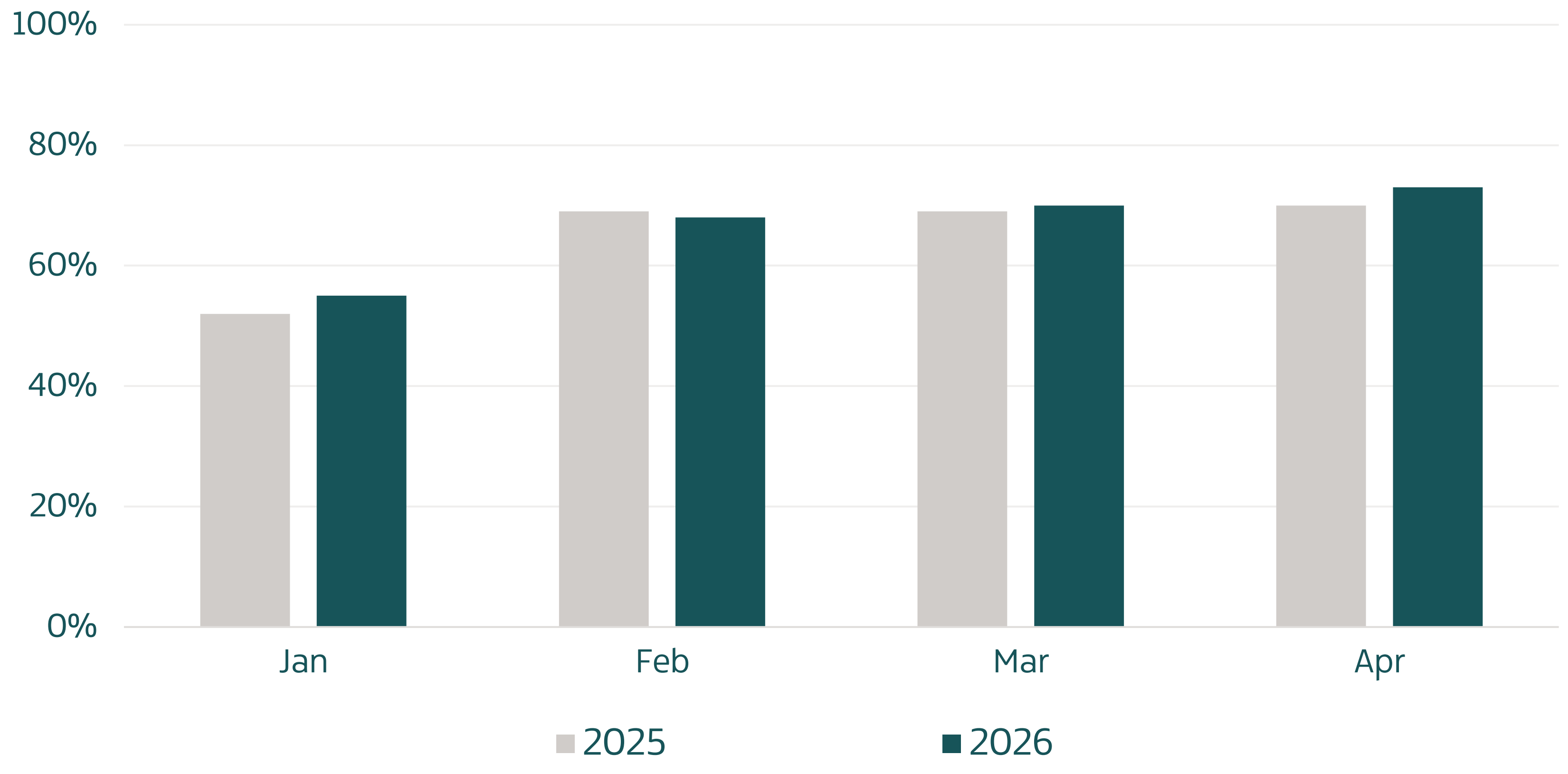
RevPAR	Change vs 2025
£69.01	+3.1%

Room Sales	Change vs 2025
788,000	+5%

NI Jan-April 2026 Room Sales vs previous year



NI Room Occupancy by Month vs previous year



Cardholder Spend

Overall tourism-related* cardholder spend in NI grew by 2% during the first quarter of the year, driven by strong growth in accommodation spend, while card spend in bars & eating places/restaurants experienced small declines.

NI domestic tourism related spend was down slightly, however increases were evident for domestic spend on accommodation.

In the first quarter of 2026, the **US market accounted for 61% of 'other overseas' tourism-related spend**, on a par with 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 categories analysed are Bars, Eating Places/Restaurants and Hotels/Motels/Resorts.*

Source: Tourism NI analysis of cardholder spend data

Tourism-Related* Spend by Market

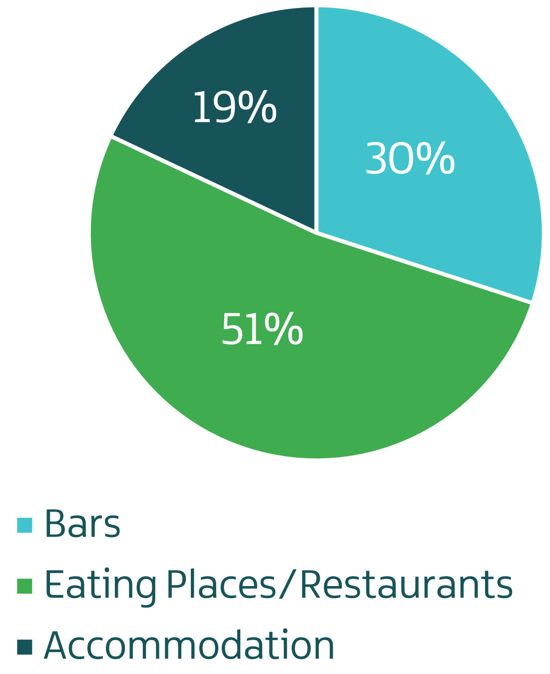
(Jan-March 2026 vs 2025)

All Markets	+2%
NI	-2%
ROI	+10%
GB	+18%
Other Overseas	+9%

Tourism-related category	All-market spend (Jan-March 2026 vs 2025)
Eating Places/ Restaurants	-3%
Bars	-2%
Accommodation	+25%

Spend by tourism-related category

(Jan-March 2026)



Air & Sea Access

Civil Aviation Authority (CAA) airport data show that air passenger flow for NI in Q1 2026 stood **at 2 million, up slightly vs Q1 2025**. Passenger numbers through **all NI's airports have increased**, with City of Derry seeing the largest growth on the back of new routes added in 2025.

Ferry data for January-April 2026 indicates that the number of passengers travelling on ferries to and from NI experienced a **decline vs January-April 2025**. For comparison, passenger numbers travelling to and from ROI in 2025 increased by 3% compared with last year, driven by growth in the central corridor (Dublin crossings).

Steady momentum is anticipated for the cruise sector for 2026.

Sources: CAA, FerryStat, VisitBelfast & VisitDerry

Air Access – Passenger Flow through NI's Main Airports

NI Air Passenger Flow - Jan-March 2026

2m Passengers

+3% vs Jan-March 2025

Belfast International	George Best Belfast City	City of Derry
+1%	+6%	+10%

Jan-March 2026 vs Jan-March 2025

Sea Access – Ferry Passengers and Scheduled Cruise Ships

Ferry Passengers to/from NI	Passengers/Crew on Cruises to NI
-7%	+3%
Jan-April 2026 vs Jan-April 2025	Jan-Dec 2026 vs Jan-Dec 2025

Online Reviews

January-May 2026

Global Review Score (GRS)*	
Accommodation	**Attractions**
89.4%	93.0%
-0.2pps vs 2025	No change vs 2025

Monitoring of visitor experience scores during January-May 2026 indicates that NI accommodation establishments and attractions continued to deliver an overall positive visitor experience, with scores comparable to those achieved during the same period in 2025.

Visitor experience scores for NI accommodation establishments and attractions are broadly on par with close competitor destinations.

**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.*

Source: Tourism NI analysis of online reviews

NI Visitor Experience Deep Dive: January-May 2026

Accommodation

Staff and location are the strongest drivers of satisfaction with NI's accommodation establishments. Guests highlighted friendly, welcoming employees, central locations and clean comfortable rooms as key strengths.

Inconsistent service quality in some properties and practical room problems, such as heat and noise or parking difficulties, are the main areas letting some stays down.

Attractions

The strongest themes from reviews of NI's attractions relate to friendly knowledgeable staff, stunning natural scenery, engaging and interactive experiences, and attractions that work especially well for families.

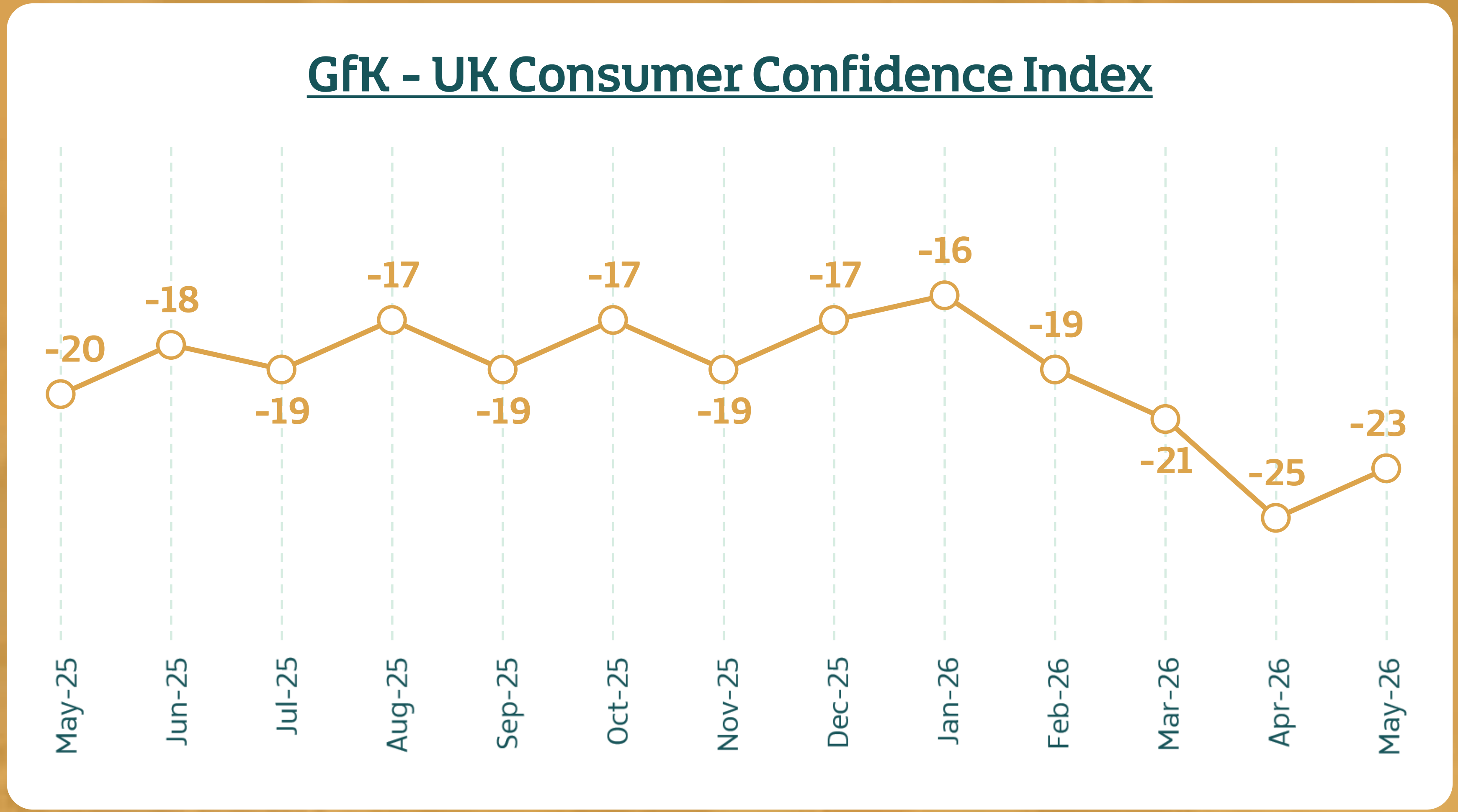
The small number of negative reviews mainly referred to crowding, high prices and inconsistent staff service.

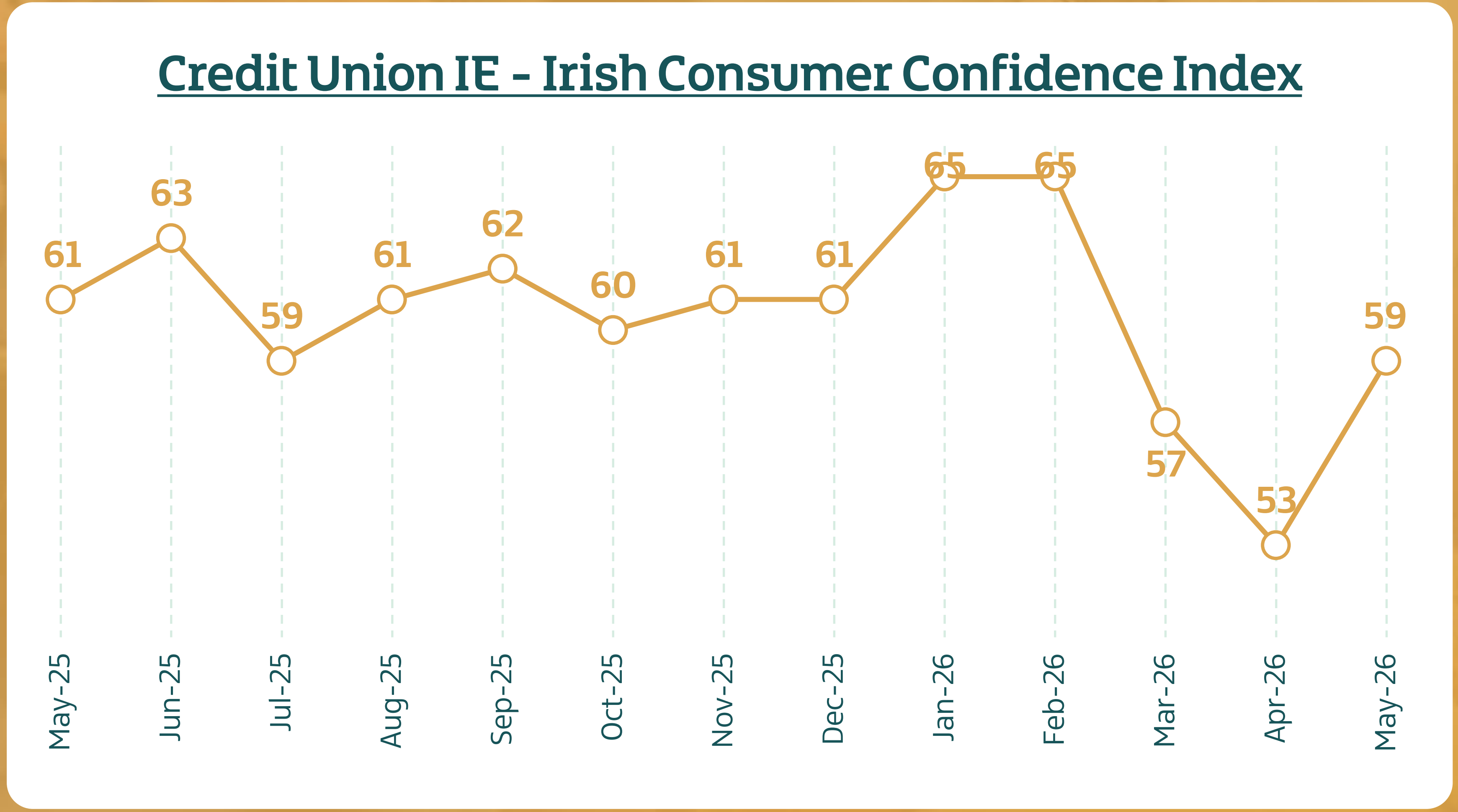
Consumer Confidence

UK Consumer Confidence Index increased slightly in May. While perceptions of personal finances and the wider economy have strengthened, there is a notable decline in intentions to make major purchases, alongside a sharp fall in savings levels. This suggests that while consumers may feel marginally more confident, cost-of-living pressures remain acute, with many households prioritising day-to-day spending over longer-term financial planning.

Irish consumer sentiment also improved in May, rising to 59.4 from a recent low, but remains well below its long-term average. The uplift has been linked to easing geopolitical tensions and government support measures, particularly around energy costs. However, the overall picture remains fragile, with households continuing to report pressure on spending power and a cautious outlook for both personal finances and the wider economy.

Sources: GfK & Credit Union Ireland





Tourism NI's Consumer Research

Tourism NI has completed the latest wave (Wave 20) of our research to track consumer sentiment in the NI and ROI markets, measuring travel behaviour in early 2026 and travel intentions for subsequent months.

Fieldwork was undertaken in March and April 2026 with a robust, nationally representative sample from each market. The key findings presented here are based on a sample of 750 adults in ROI and 400 adults in NI.

Click here to view findings from the latest wave of Consumer Sentiment Research.

Source: Tourism Northern Ireland

An increase in NI visits was evident for both domestic and ROI residents for the first few months of 2026, alongside exceptionally strong visitor satisfaction with NI's outdoor experiences, dining, and hospitality.

NI residents showed a growing intent for domestic breaks through to summer 2026, alongside a decline in plans for longer overseas trips and short breaks in ROI.

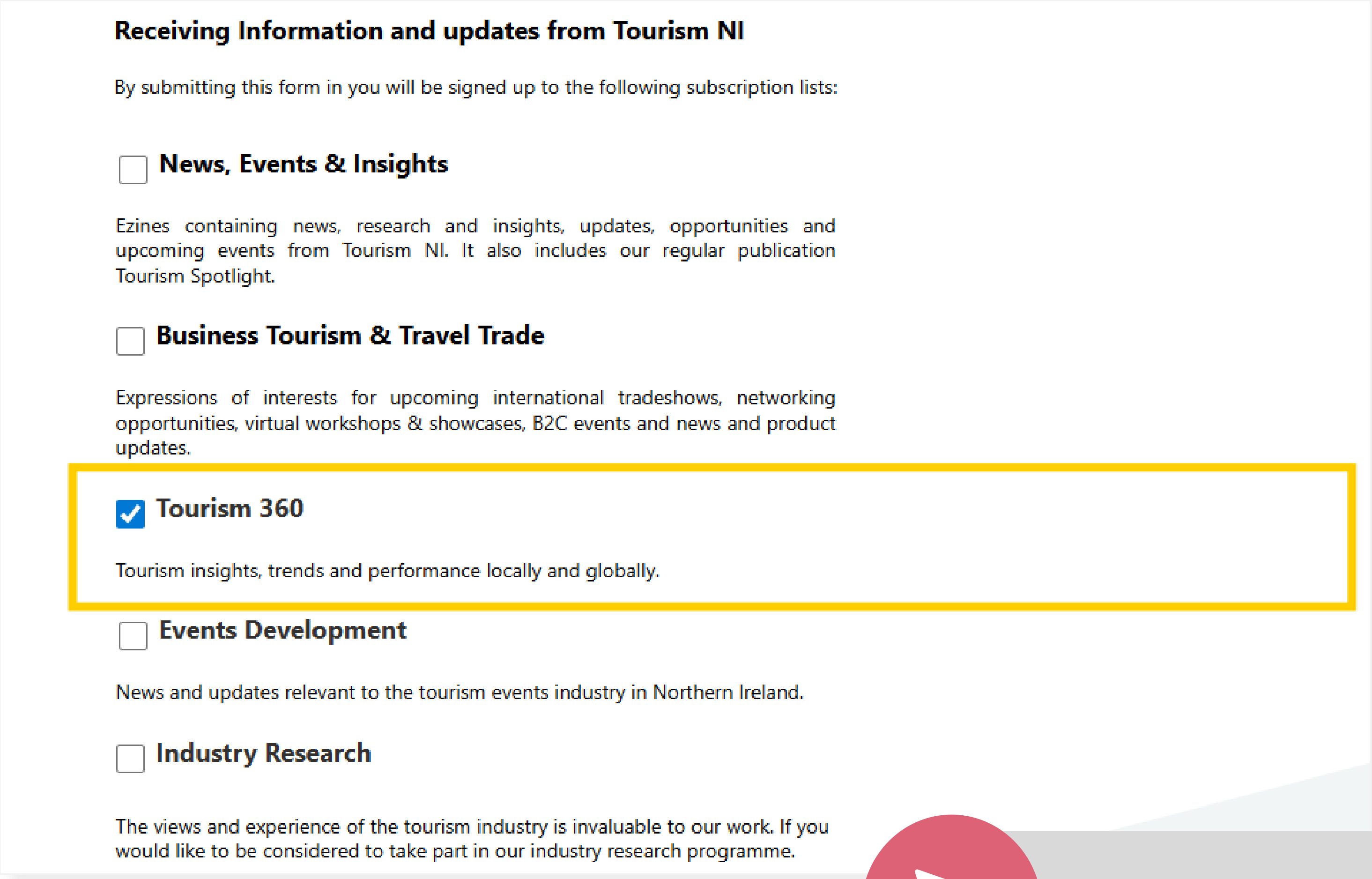
ROI intent to visit NI and take domestic breaks remained steady through to summer 2026. Intentions for longer breaks abroad dipped but picked up for the summer period.

Driven by financial pressures and geopolitical concerns, **one in five NI and ROI consumers are scaling back long-haul travel and pivoting towards closer destinations**.

Relaxation remains the top motivator for both markets, with NI consumers also seeking quality accommodation and new places to explore, while ROI visitors prioritise escapism and fun.

Despite a recent dip in overall perceptions, **NI continues to outperform ROI and GB on value**, particularly among actual 2026 visitors, whose first-hand experiences drive significantly stronger ratings.

Tourism 360° – Mailing List



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☑ **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.

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This report was produced in June 2026 by Tourism NI's Insights & Intelligence Service.

TOURISM NORTHERN IRELAND