Tourism NI Industry Survey

July 2025 Report

Research objectives, methodology & sample

Research objectives

This report details the findings from Tourism NI's Industry Survey, the purpose of which was to gather information to enable Tourism NI to:

- Monitor industry performance for the year to date (January-June 2025).
- Assess expectations for July-September 2025.
- Determine causes for concern & reasons to be positive regarding business this year.

Methodology

- Cognisense Ltd. conducted the survey and data analysis.

- A total of 404 businesses participated:

  162 online

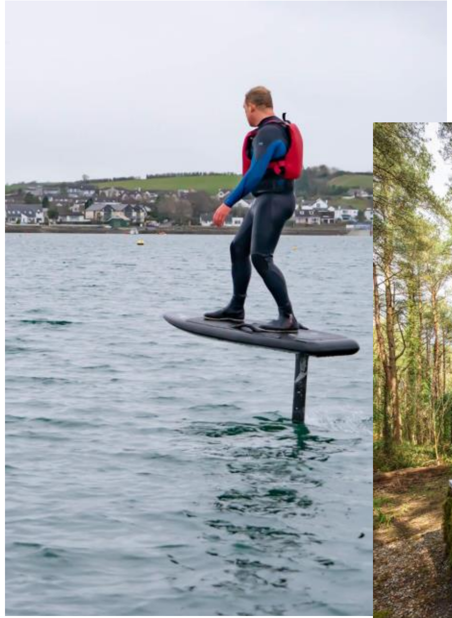
  242 via telephone

- The fieldwork was administered 12th June-8th July 2025.

- All research was carried out in accordance with the Market Research Society's Code of Conduct.

Responses by sector

Sector	Responses (% of sample)
Accommodation provider	209 (52%)
Activity/experience provider	89 (22%)
Attraction	57 (14%)
Tour operator	15 (4%)
Golf club	14 (3%)
Carrier/transport provider	5 (1%)
Bar/restaurant/cafe	3 (1%)
Other	12 (3%)
Total	**404**



Accommodation businesses make up 52% of the survey sample, with activity/experience providers representing 22% and attractions a further 14%.

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Q. What type of business do you run? *Base: all businesses (n=404).*

Key findings

Overview

Overall, positive visitor volumes were reported for the closer to home and international markets during the first half of 2025, although just under three in ten businesses reported a decline across these markets.

While the outlook was generally optimistic for the July-September summer period, significant levels of concern remain regarding a number of key issues, including the impact of reduced disposable incomes and increased operating costs.

Strong visitor volumes overall, although global events and high costs are having an impact on overseas markets

Two in five businesses reported higher turnover for January-June 2025 compared to the same period in 2024. One-third reported similar levels, while 25% reported a decrease in turnover.

A significant proportion of businesses reported growth across the NI domestic (40%), GB (37%) and ROI (33%) markets. A minority of under three in ten experienced reduced visitor volumes from these close to home markets.

Around three in ten reported an increase in international visitor volumes: USA (31%), mainland Europe (31%) and rest of world (28%).

For those businesses that reported a decrease in volume from the USA (28%), mainland Europe (27%), and rest of world (26%) markets, influencing factors cited for each market included the impact of global uncertainties on international travel, the cost of travel and transport to NI, and the cheaper offering from competitor destinations.

Profitability encouraging and outlook optimistic

- Almost two in five (37%) businesses indicated their profitability for January-June 2025 was above the level recorded in 2024, with just under one-third (31%) reporting that there had been no change. A similar proportion (29%) noted a decrease in profitability.

- Around two in five (42%) businesses expect their overall business volume for July-September 2025 to be higher than for the same period in 2024, with one-third expecting to see a similar volume, while 26% were expecting a decrease.

- The vast majority (88%) of businesses cited a reason to be positive for the rest of the year, with repeat visitors (41%) the most likely cause cited for this optimism.

Confidence from the majority despite challenging operating environment

- While the majority (71%) felt confident about running their business profitably for the rest of the year, this was not the case for a quarter (25%) of businesses.

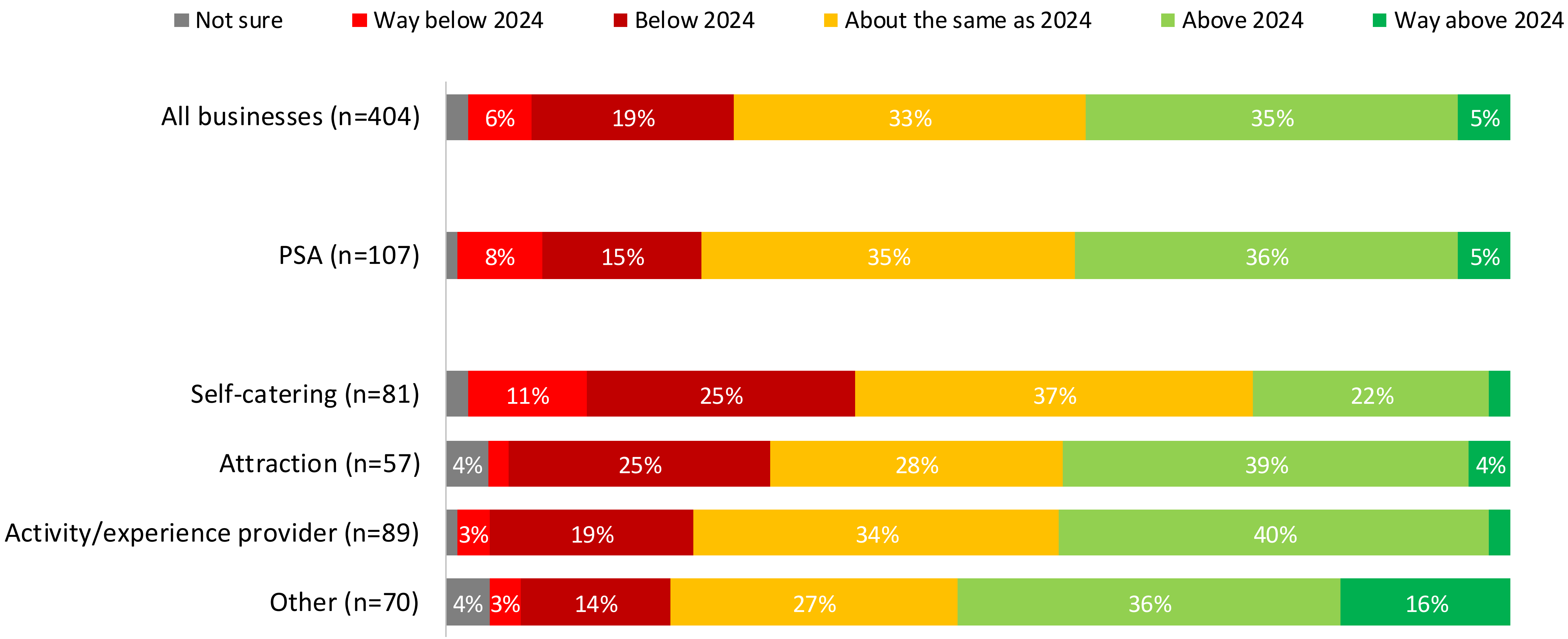
- Nearly four in five (78%) felt that there were causes for concern regarding business this year, with a reduction in people's disposable incomes (35%) most likely to have been mentioned. For employers, high staff costs (23%) were a notable worry.

- Around two in five (42%) businesses had increased or intended to increase their prices, with higher overheads most likely to be the reason for doing so. Close to half (48%) of businesses had taken some other action in response to rising operating costs.

Business performance

January-June 2025

Business <u>turnover</u> January-June 2025 *v* same period in 2024



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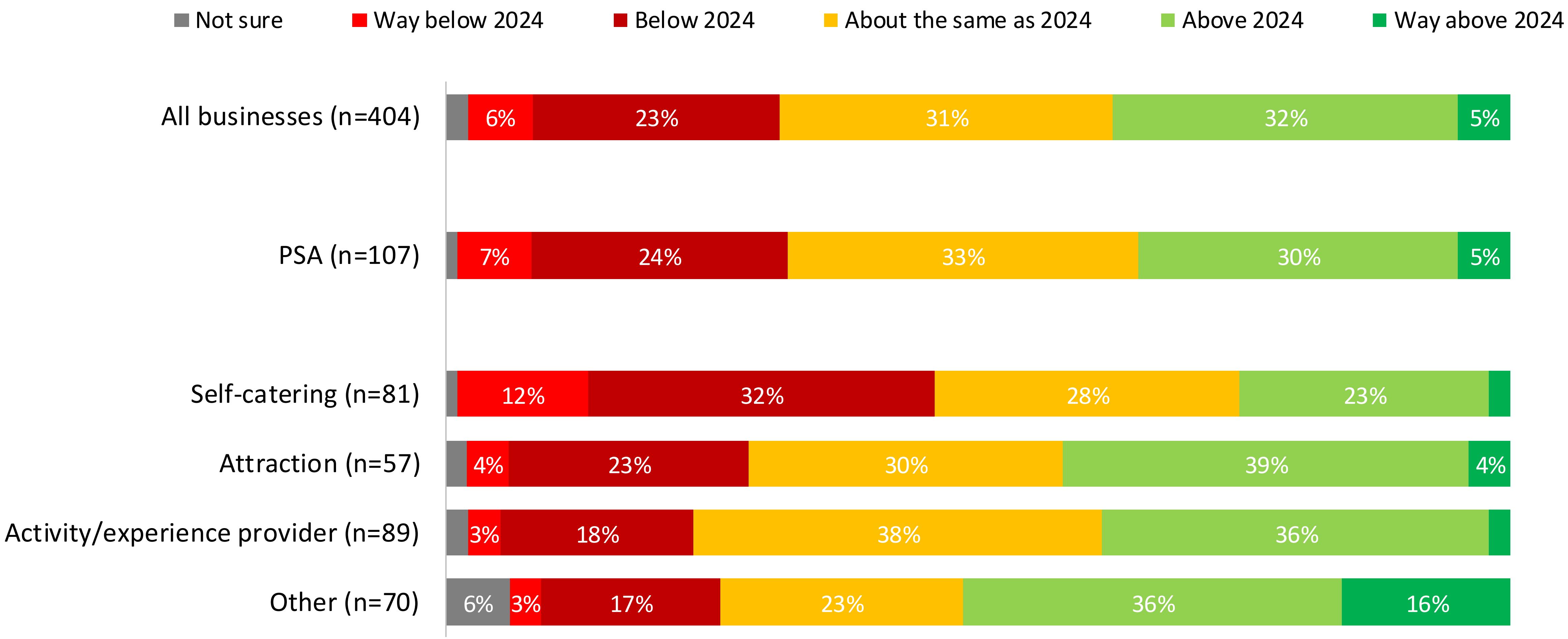
Q. Was your business turnover better or worse for January to June 2025 compared to the same period in 2024?

Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.

PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation

Business profitability January-June 2025 *v* same period in 2024

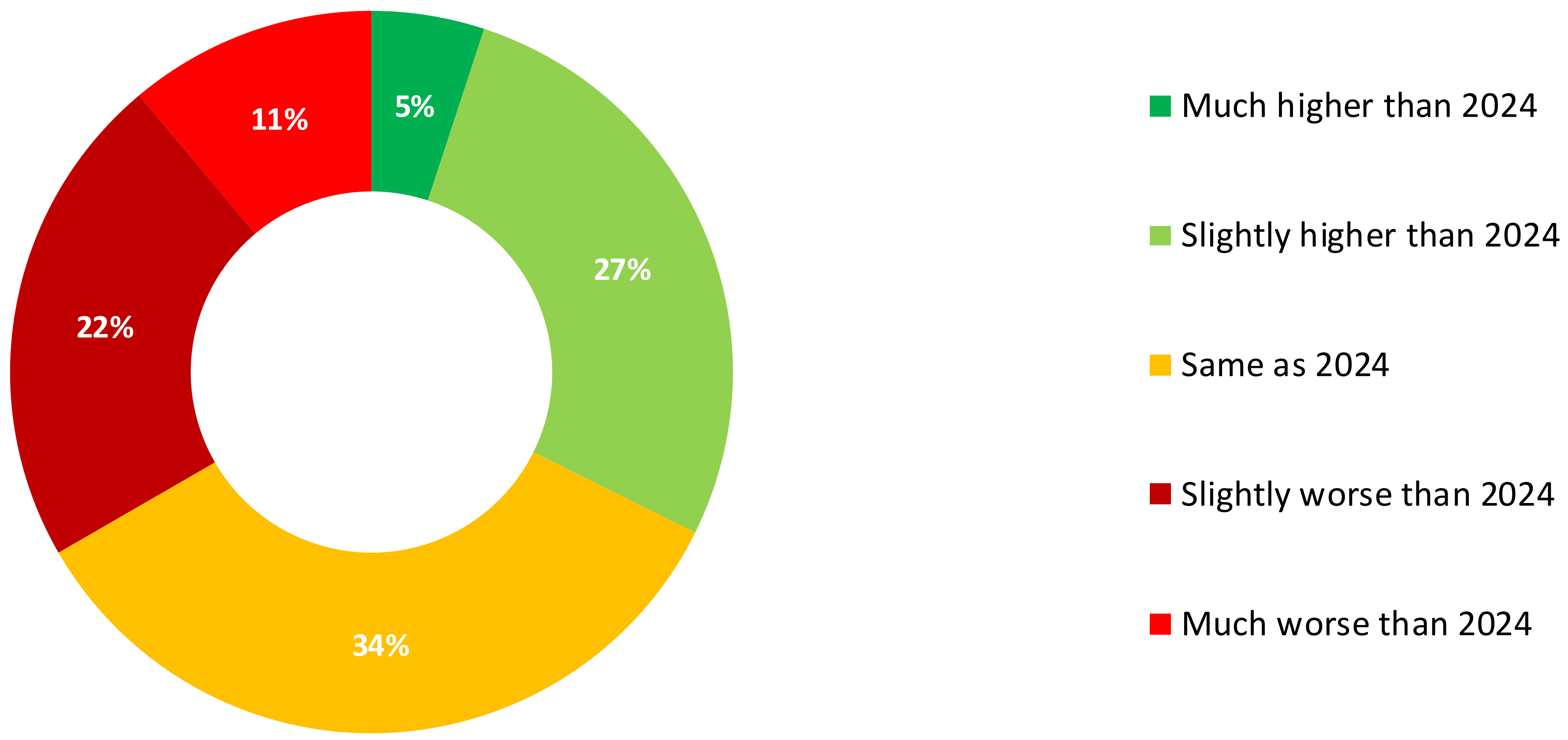


Q. Was your business profitability better or worse for January to June 2025 compared to the same period in 2024?

Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.

PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses & guest accommodation

Average room yield January-June 2025 *v* same period in 2024



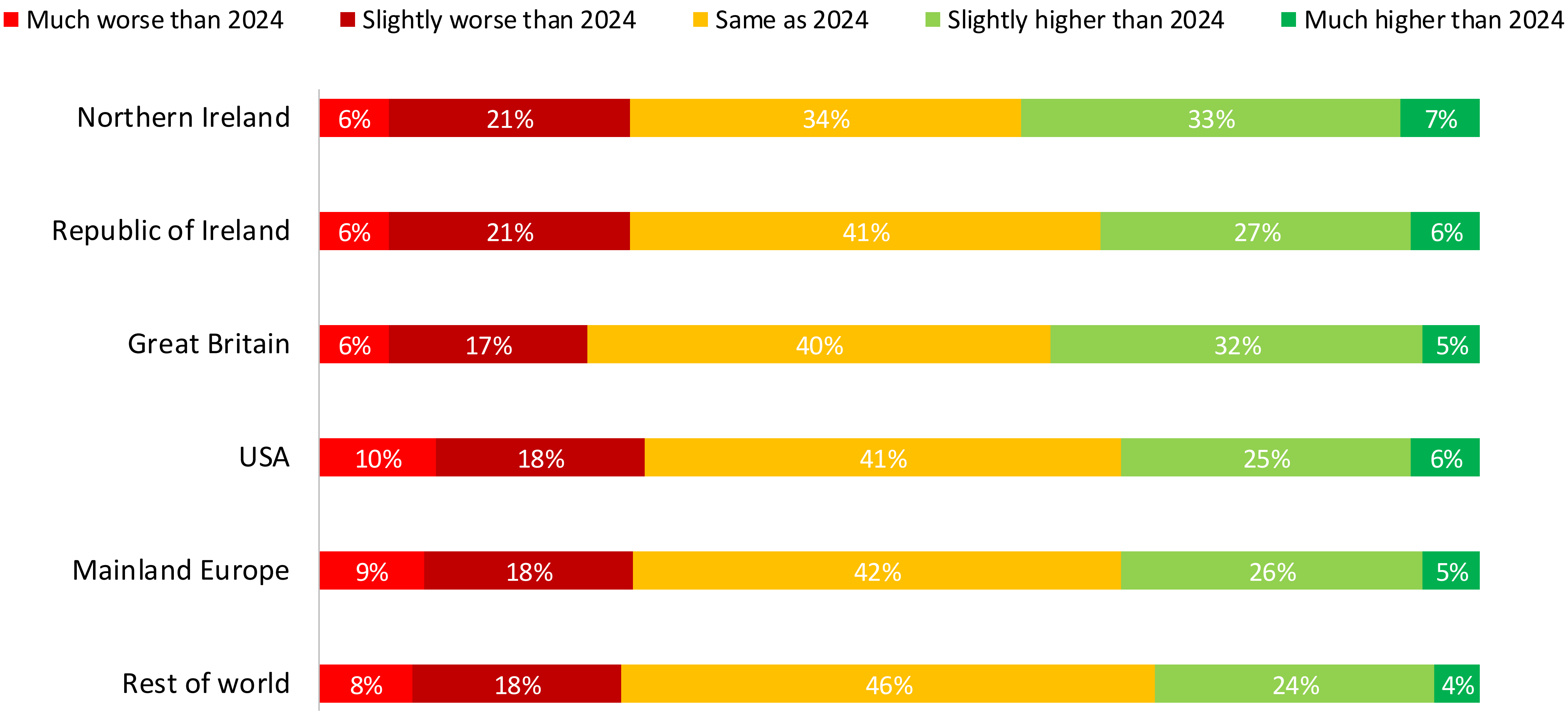
Q. Thinking about the year to date (January to June 2025), how does your average room yield compare to the same time in 2024?

Base: all accommodation providers (n=209).

Business performance

January-June 2025 by market

Volume of business January-June 2025 *v* same period 2024: market summary



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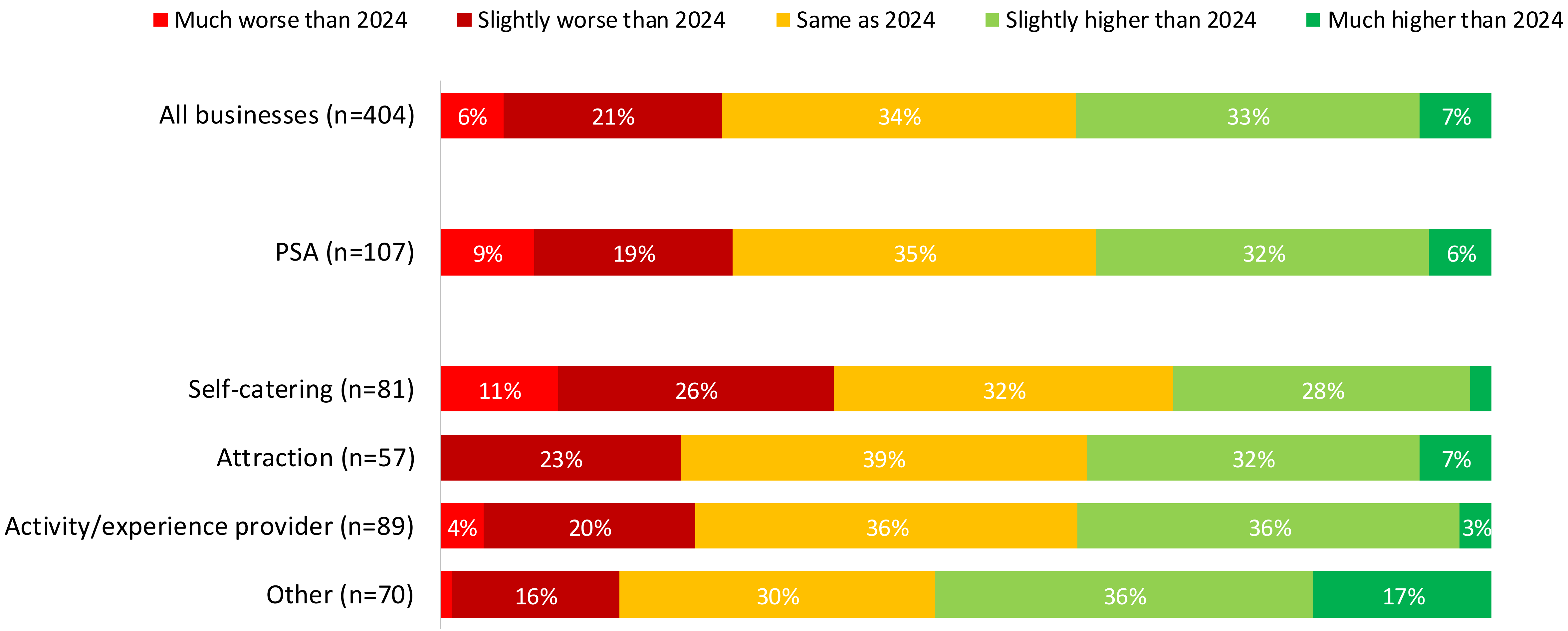
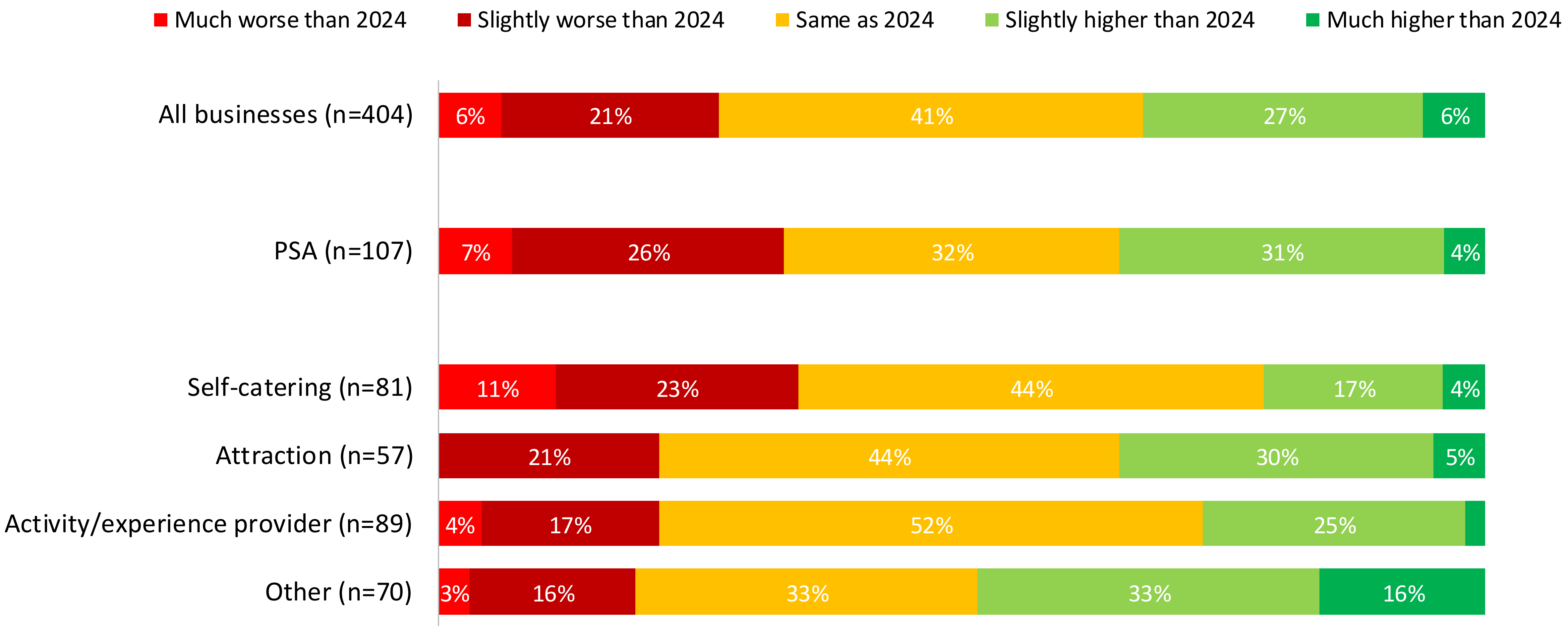
Q. Thinking about the year to date (January to June 2025), how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses (n=404).*

Volume of business January-June 2025 *v* same period in 2024 for NI market



Q. Thinking about the year to date (January to June 2025), how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.*

Volume of business January-June 2025 *v* same period in 2024 for ROI market



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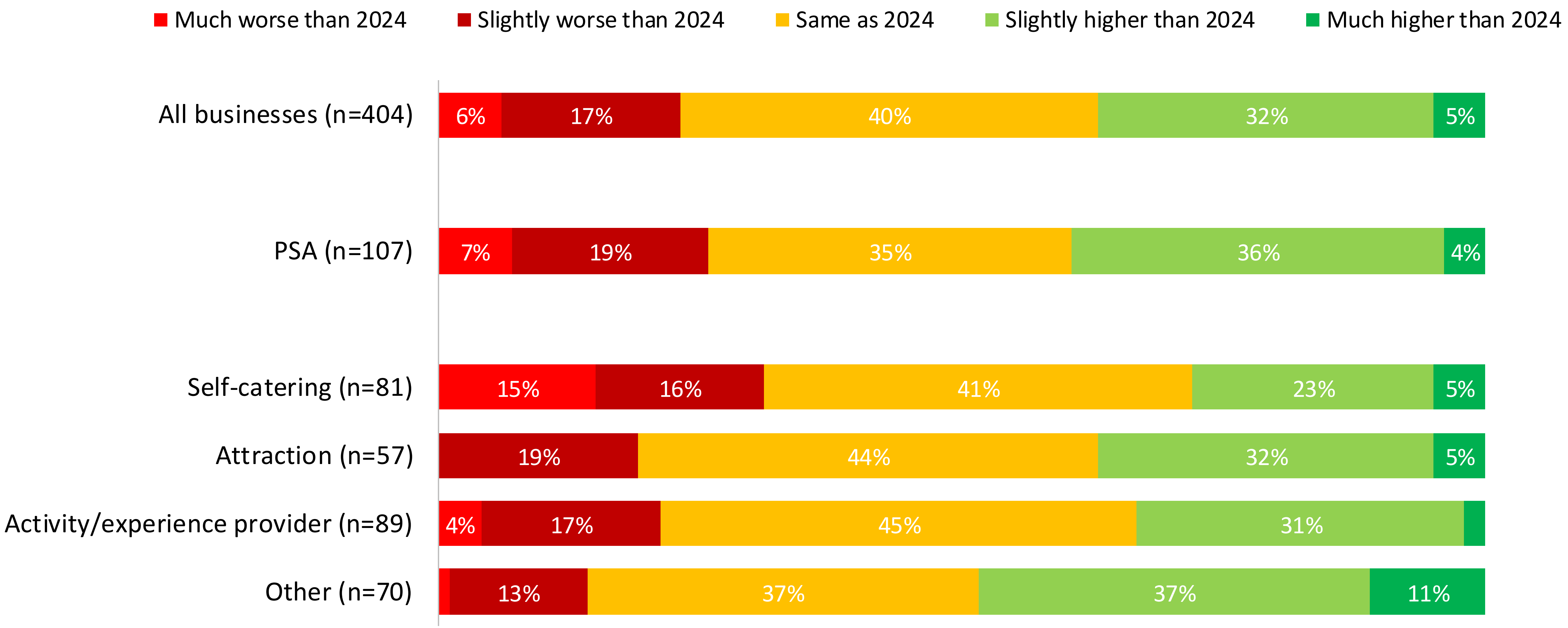
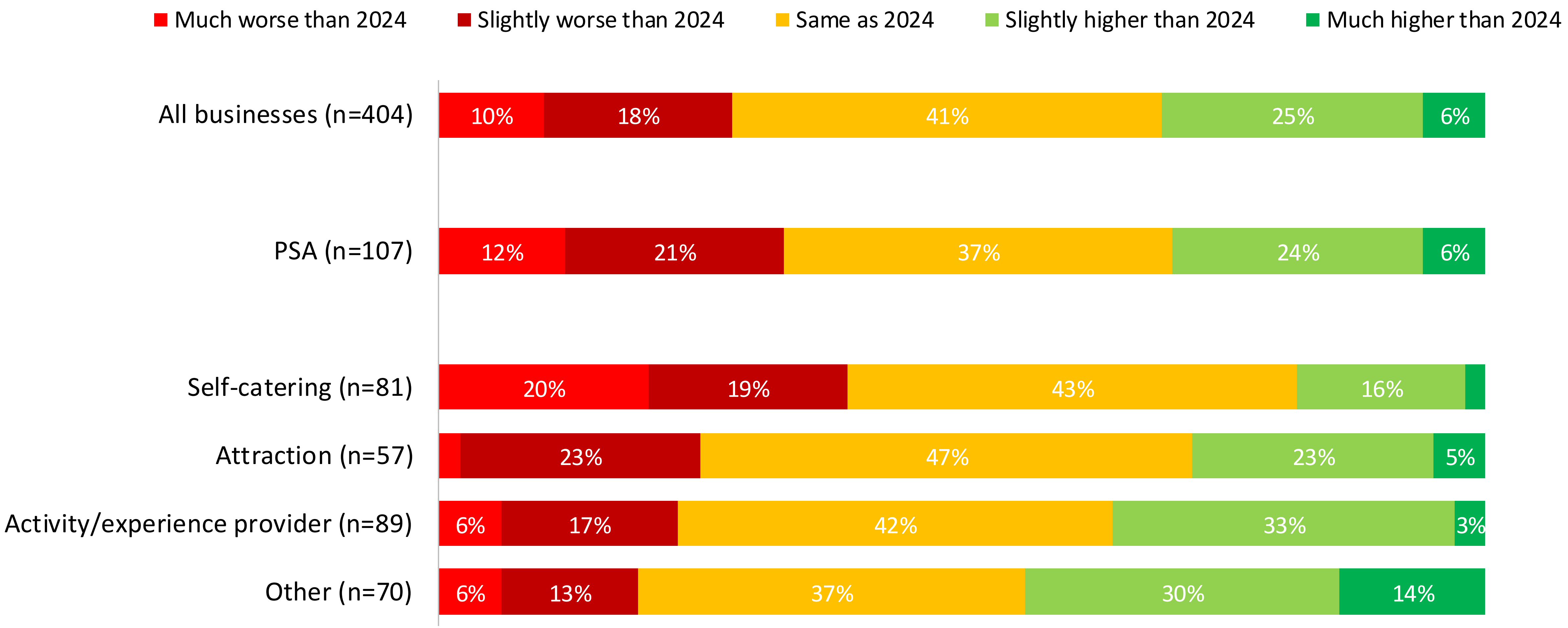
Q. Thinking about the year to date (January to June 2025), how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: the chart segment without a data label = 2%.*

Volume of business January-June 2025 *v* same period in 2024 for GB market



Q. Thinking about the year to date (January to June 2025), how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.*

Volume of business January-June 2025 *v* same period in 2024 for USA market



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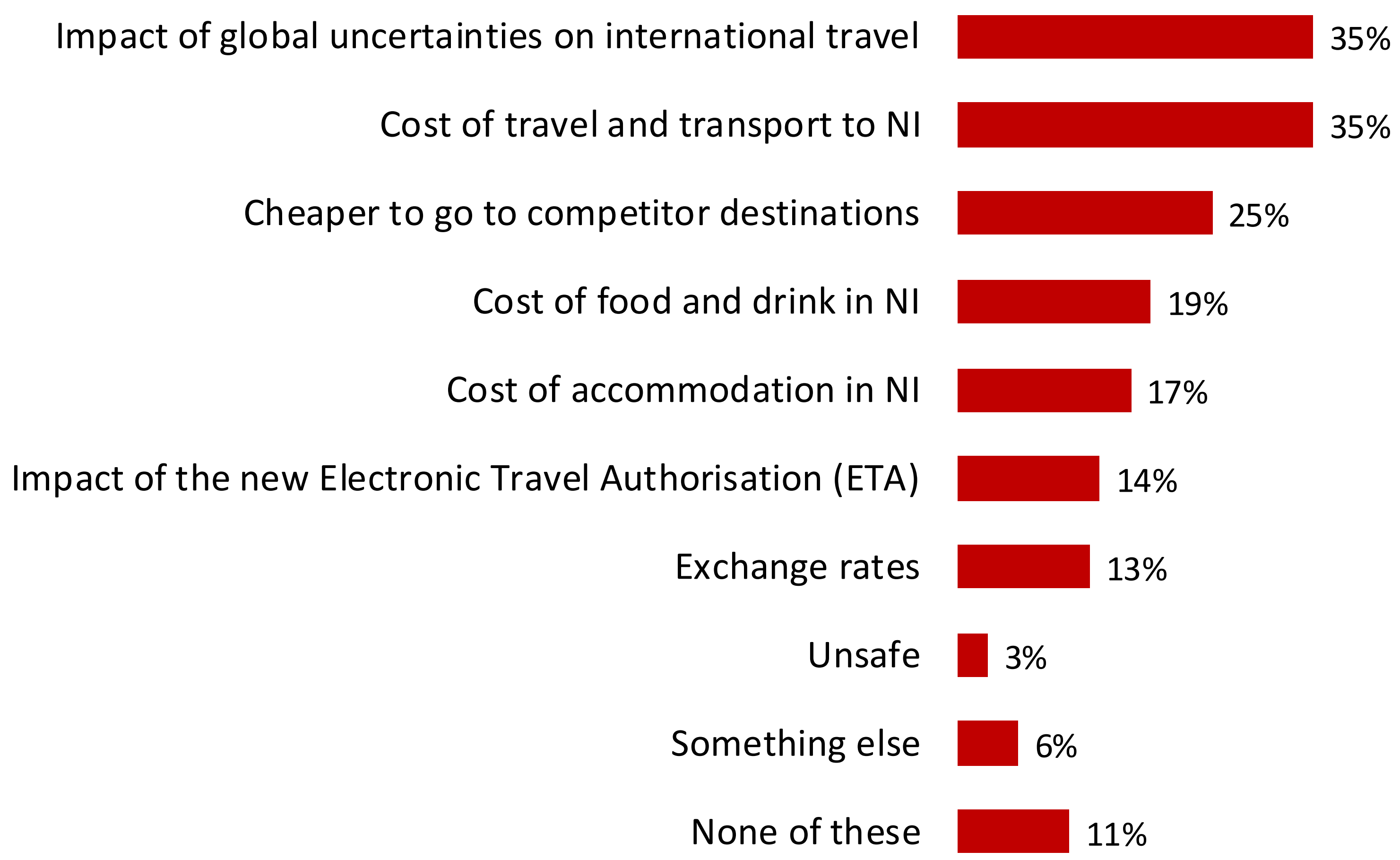
Q. Thinking about the year to date (January to June 2025), how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.*

Factors influencing worse USA market performance for January-June 2025 *v* same period in 2024



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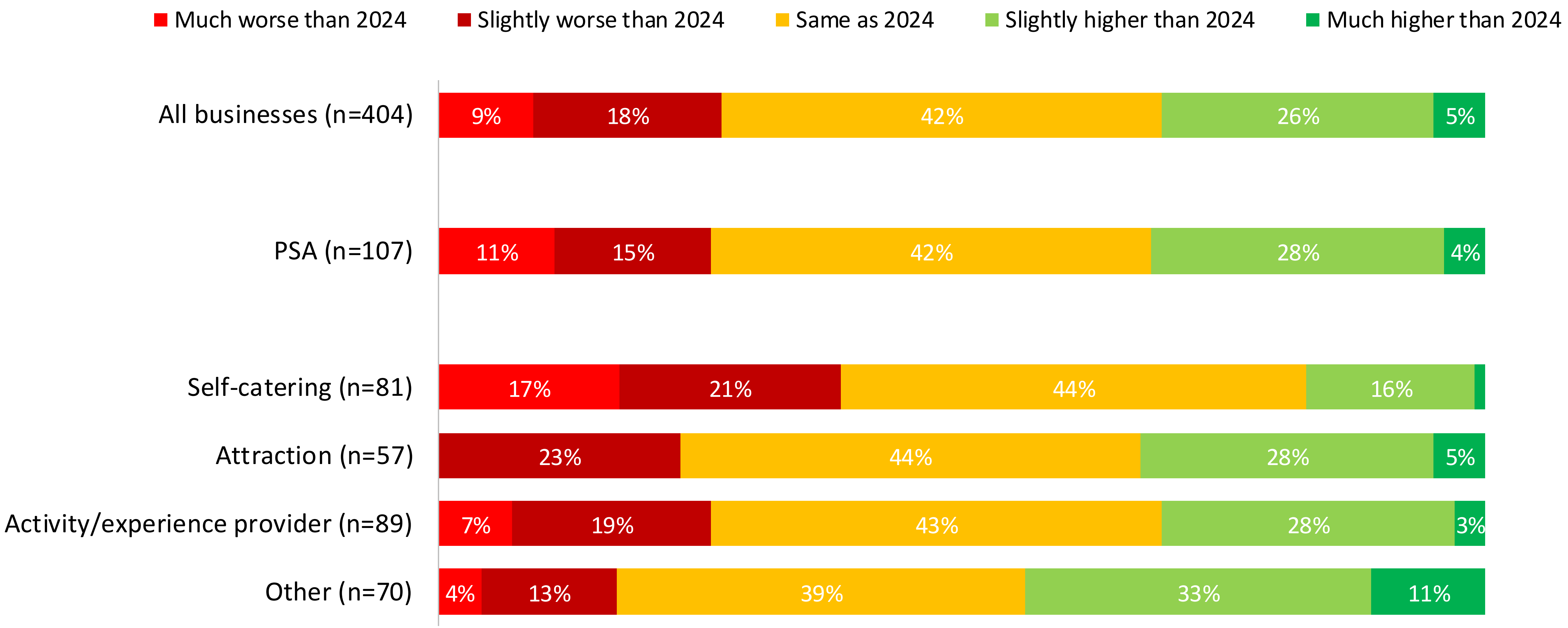
Q. Which, if any, of the following are factors influencing the worse performance [for January to June 2025 compared to the previous year] for the USA market? *Base: all businesses with worse USA market performance for January-June 2025 compared to the previous year (n=113).*

Volume of business January-June 2025 *v* same period in 2024 for mainland Europe market



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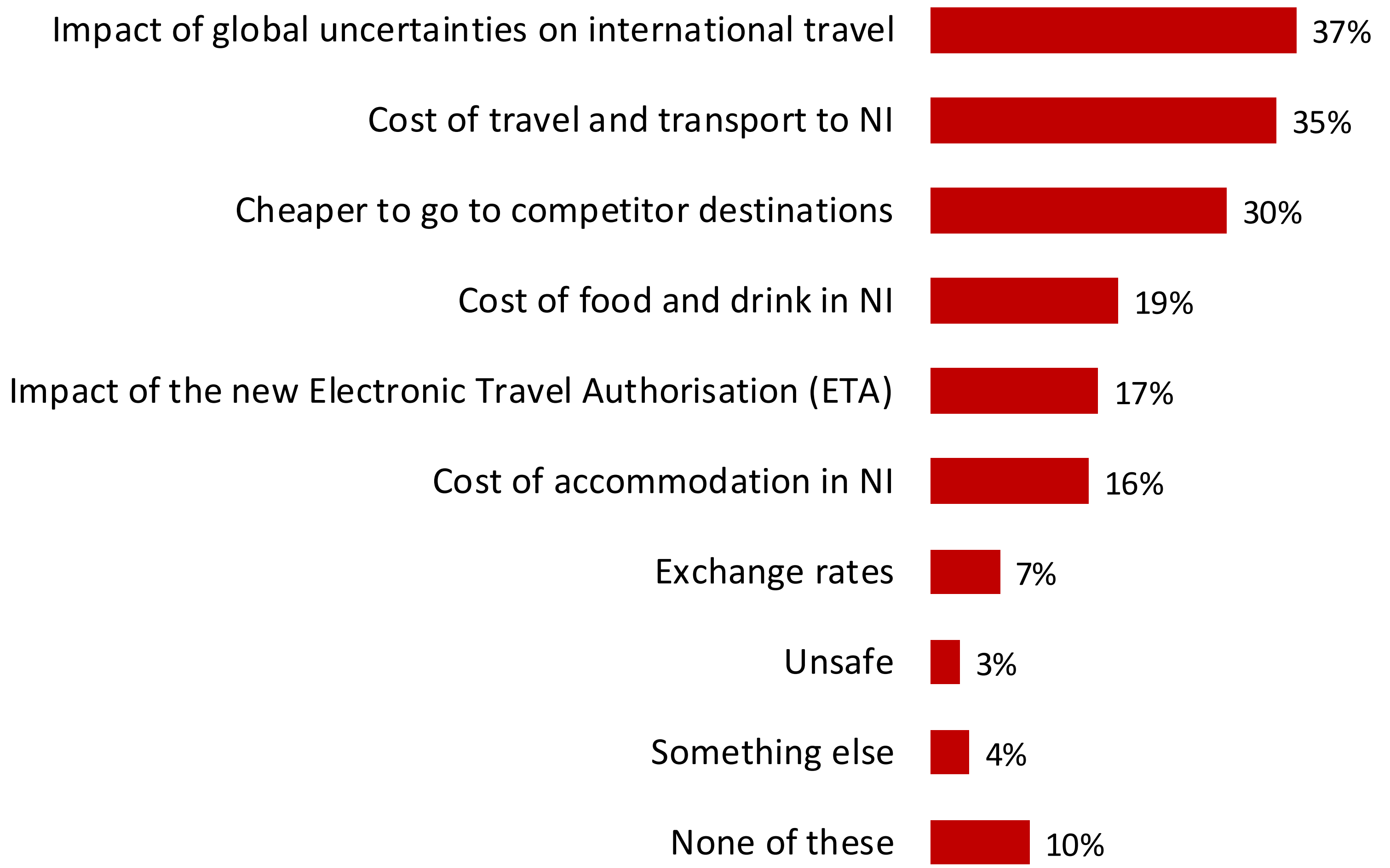
Q. Thinking about the year to date (January to June 2025), how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label = 1%.*

Factors influencing worse mainland Europe market performance for January-June 2025 *v* same period in 2024



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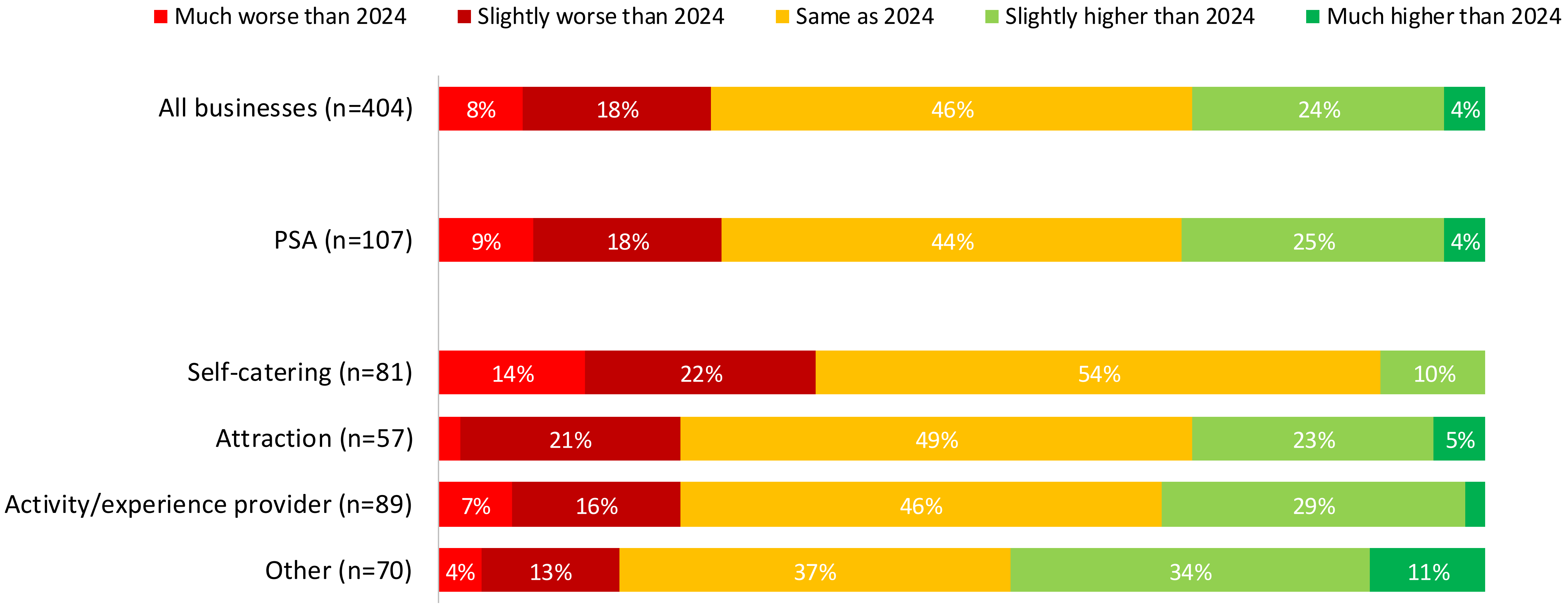
Q. Which, if any, of the following are factors influencing the worse performance [for January to June 2025 compared to the previous year] for the mainland Europe market? *Base: all businesses with worse mainland Europe market performance for January-June 2025 compared to the previous year (n=107).*

Volume of business January-June 2025 *v* same period in 2024 for rest of world market



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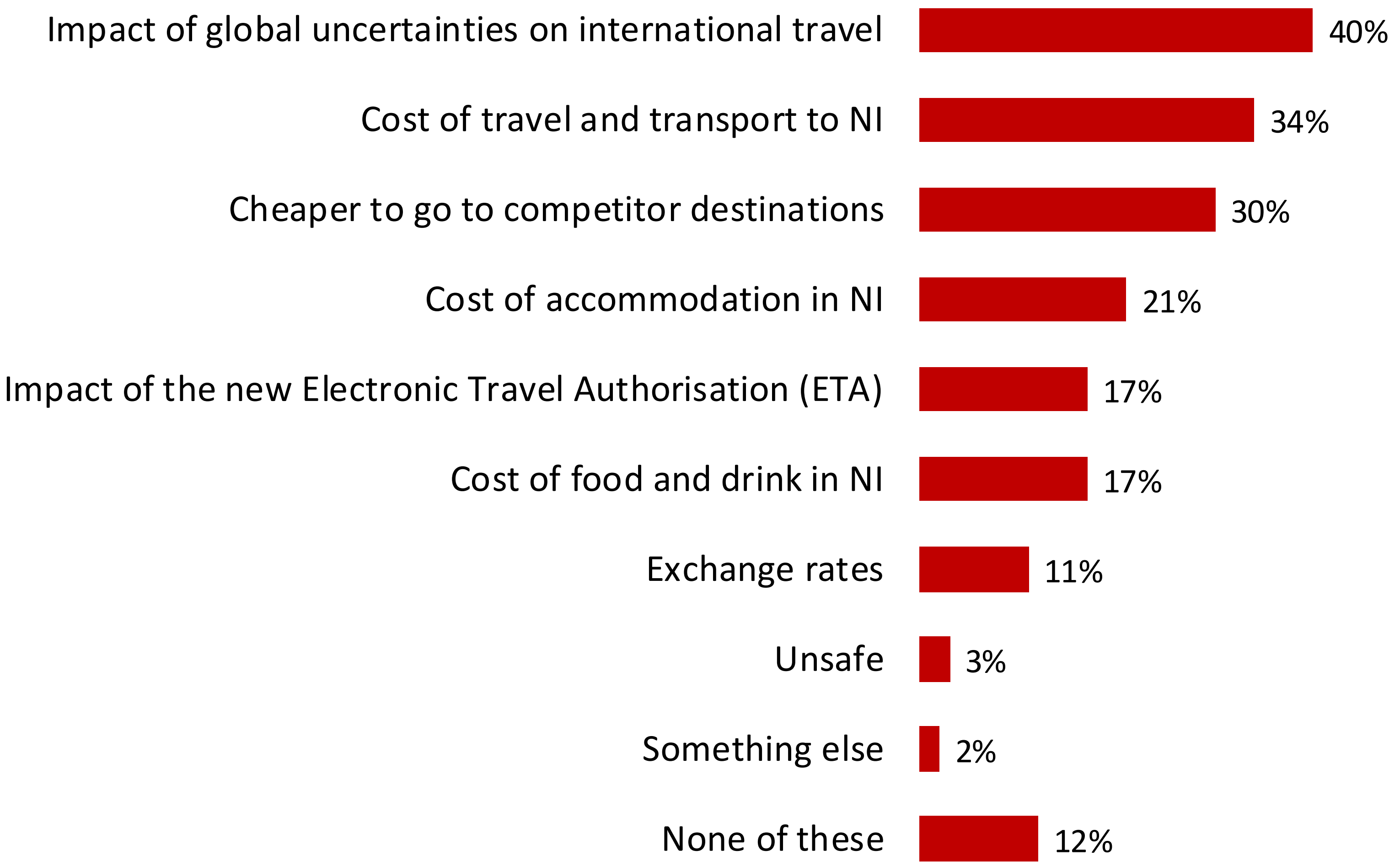
Q. Thinking about the year to date (January to June 2025), how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label = 2%.*

Factors influencing worse rest of world market performance for January-June 2025 *v* same period in 2024



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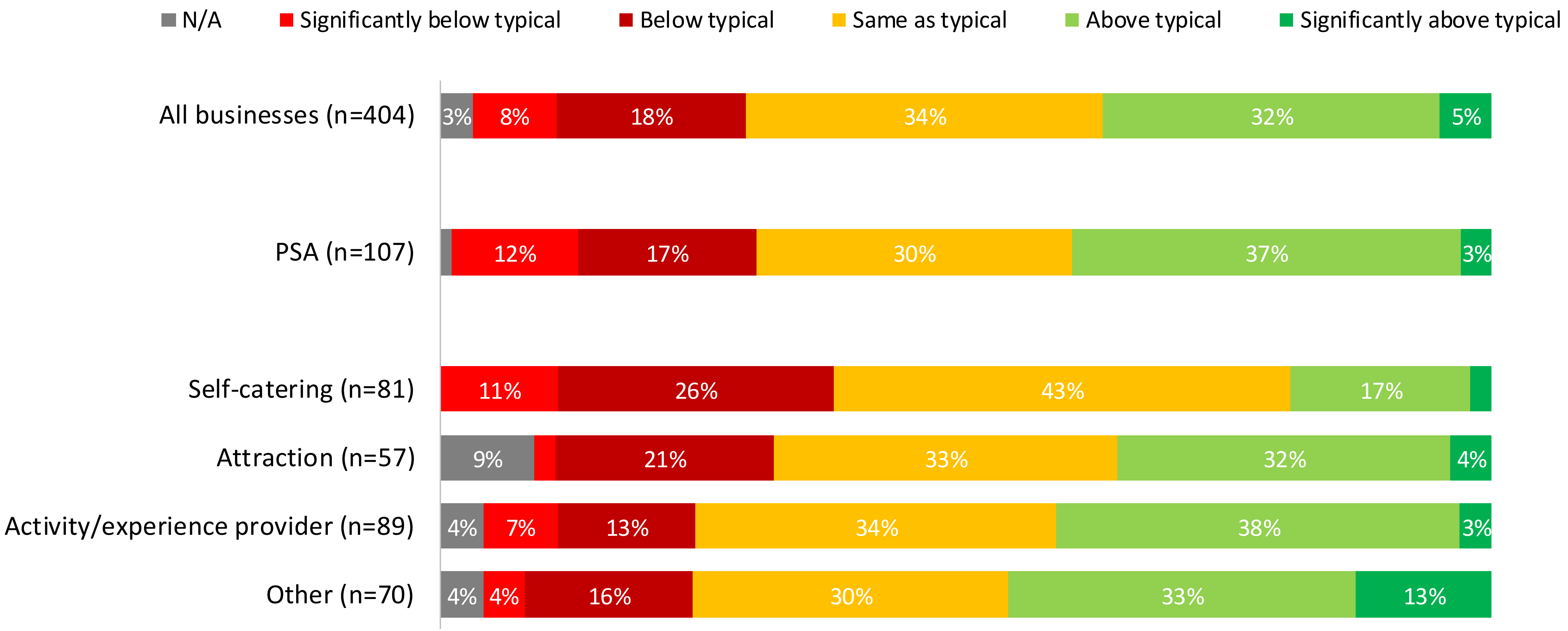
Q. Which, if any, of the following are factors influencing the worse performance [for January to June 2025 compared to the previous year] for the rest of world market? *Base: all businesses with worse rest of world market performance for January-June 2025 compared to the previous year (n=103).*

Advance bookings & business expectations (July-September 2025)

Advance bookings for July-September 2025 compared to normal



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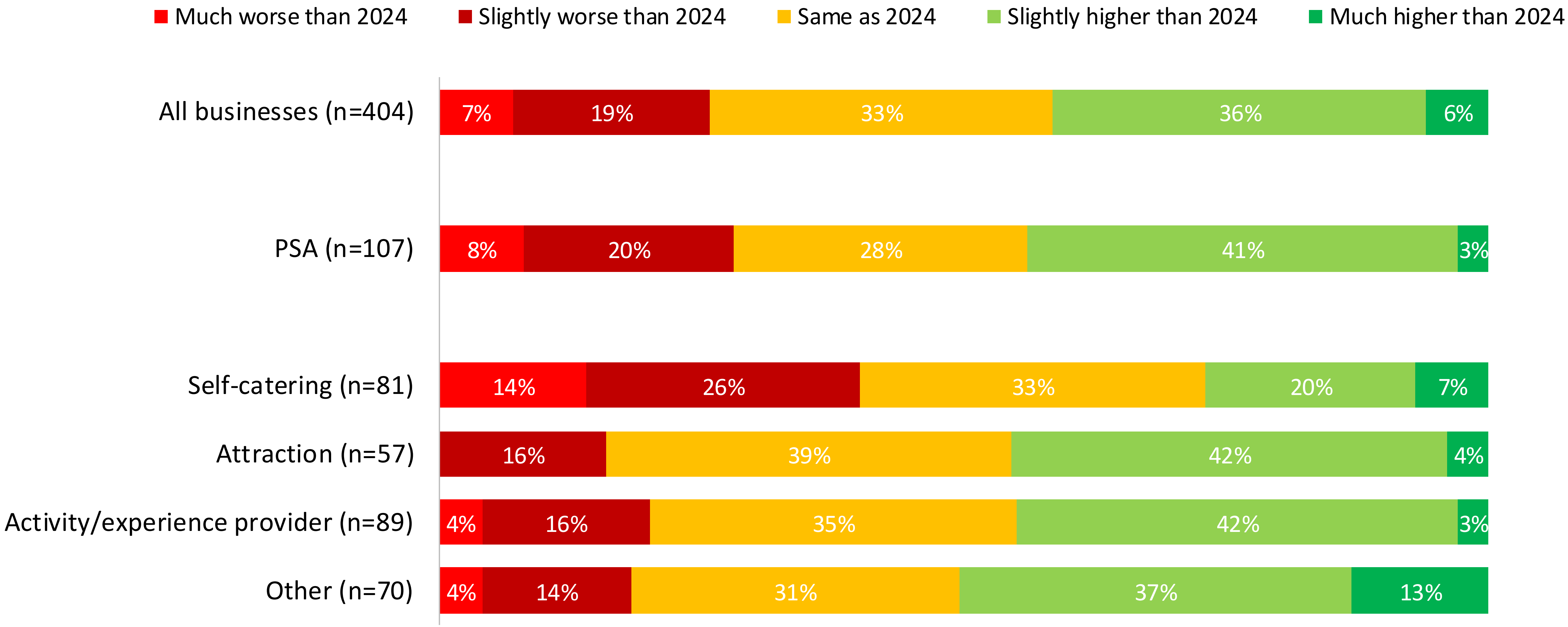
Q. How many advance bookings do you have for the upcoming summer months (July to September 2025) compared to what you would normally have at this point in the year? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.*

Expectations regarding business volume for July-September 2025 *v* same period in 2024



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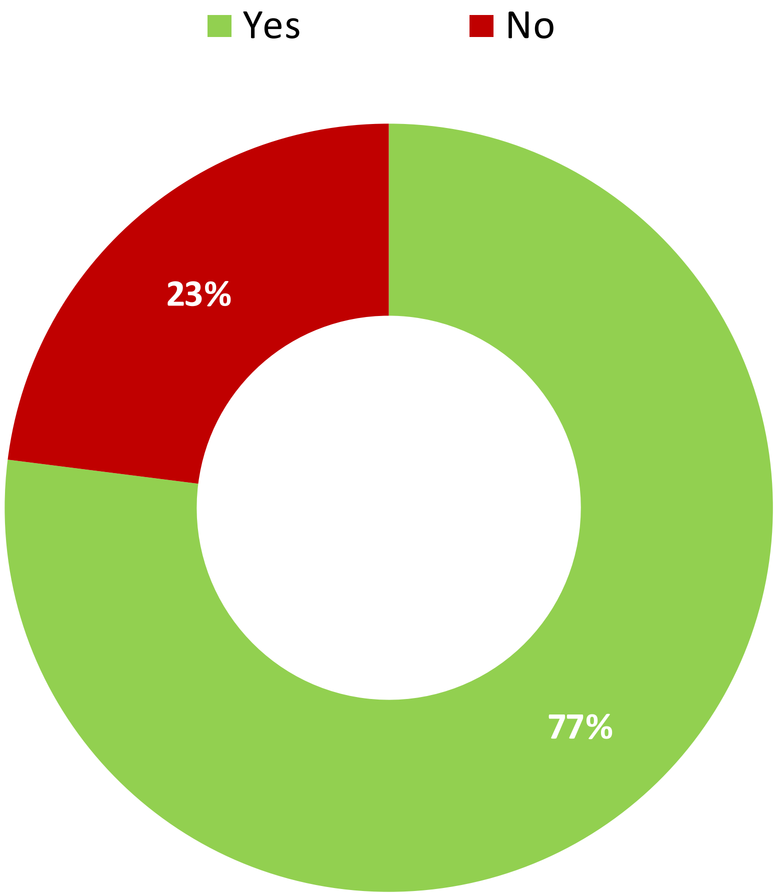
Q. Thinking about the upcoming summer months (July to September 2025), how do you feel the volume of your overall business will compare with the same period in 2024? *Base: all businesses – sample sizes denoted on chart.*

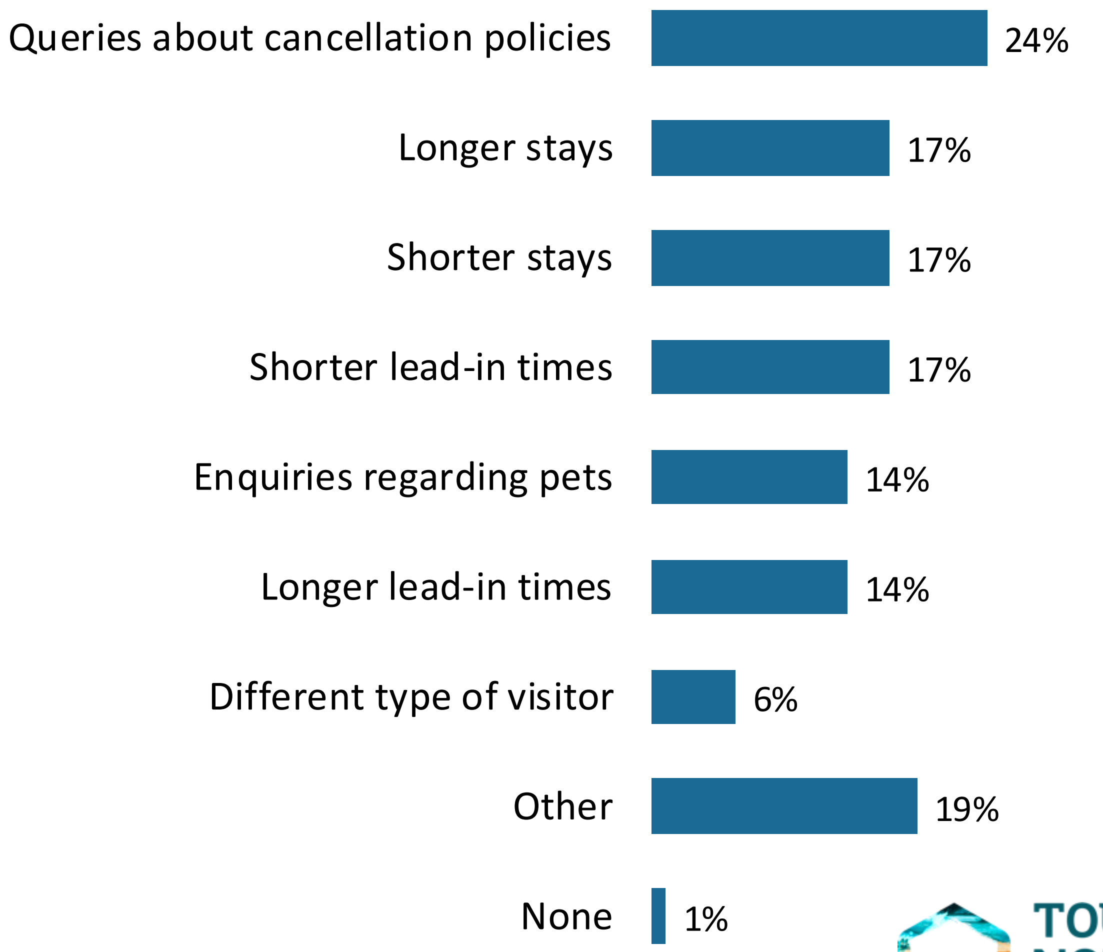
Flexible booking and booking trends for 2025

Flexible booking terms



Q. Do you offer flexible booking terms (such as free cancellation, opportunity to move booking)? *Base: all businesses (n=404).*

Booking trends for 2025 that are different from normal



Q. Are there any booking trends you're noticing for 2025 that are different from normal? *Base: all businesses (n=404).*

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Reasons to be positive regarding business for the remainder of the year

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Q. Are there any particular reasons to be positive about business for the remainder of the year?
Base: all businesses (n=404).

Causes for concern regarding business this year

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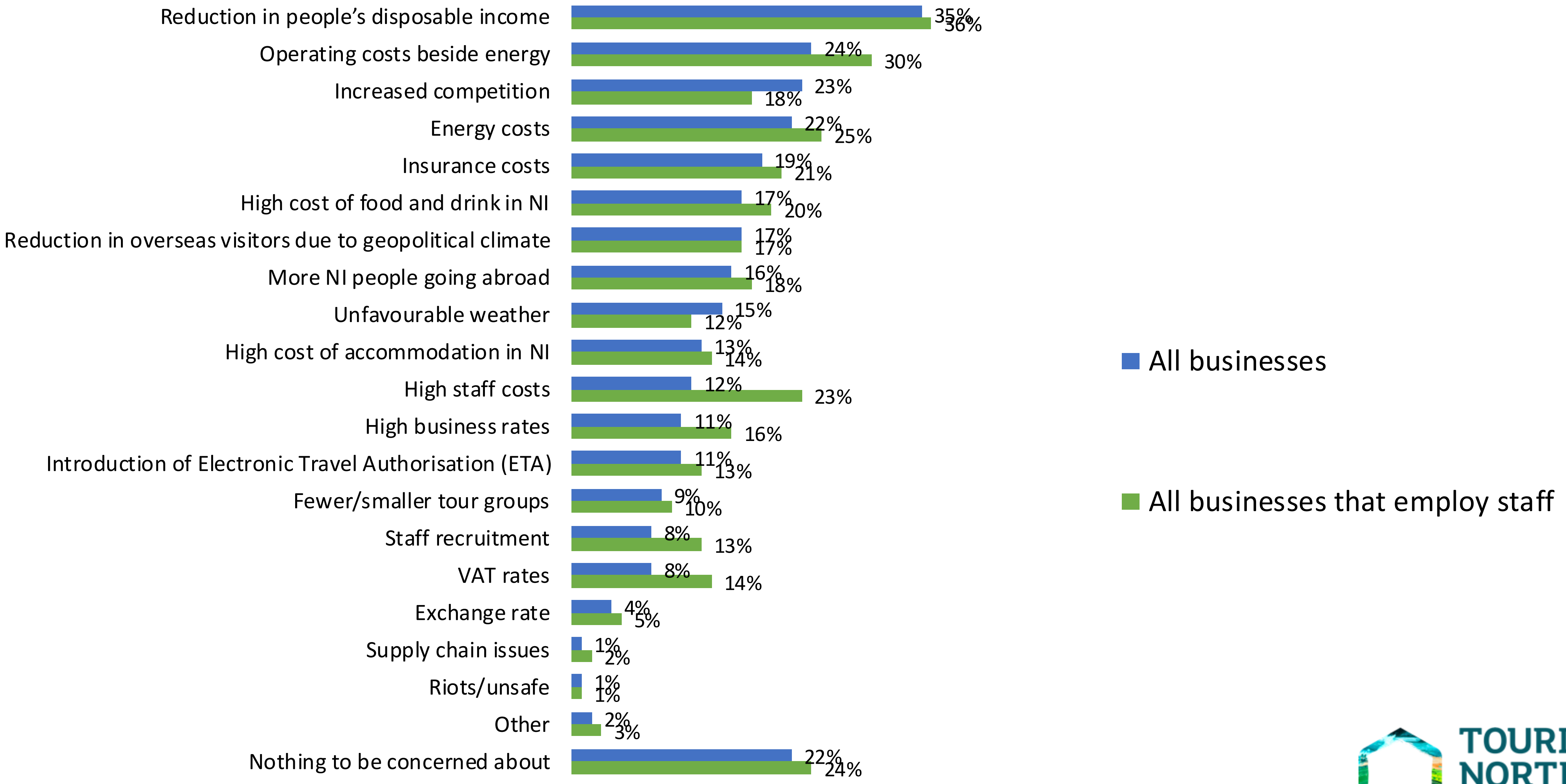

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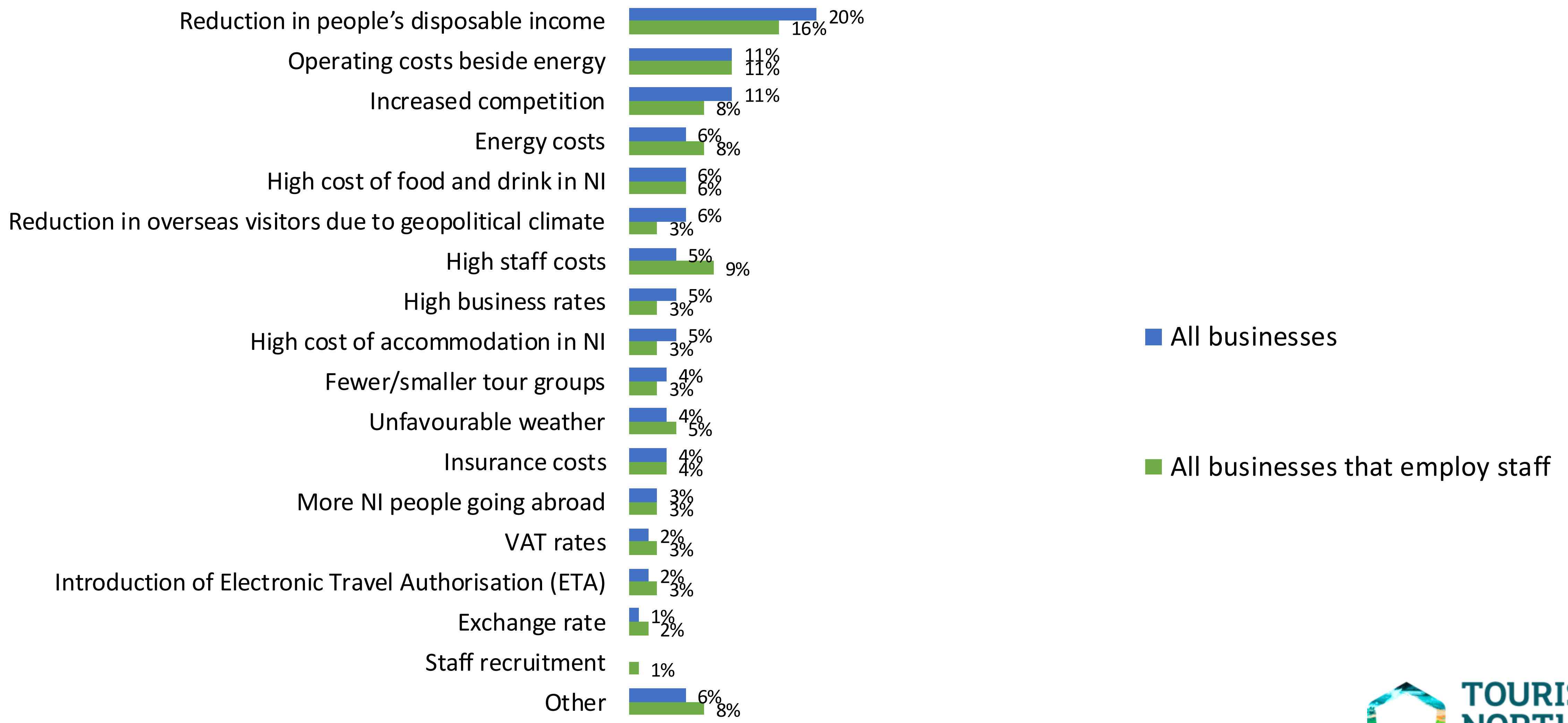
Q. Are there any particular causes for concern regarding business this year?
Base: all businesses (n=404); all businesses that employ staff (n=161).

Causes for concern regarding business this year – ranked first



Q. Please rank the top three causes for concern regarding business this year?
Base: all businesses with concerns (n=285); all businesses with concerns that employ staff (n=116).

Confidence about running a tourism business profitably for the remainder of the year

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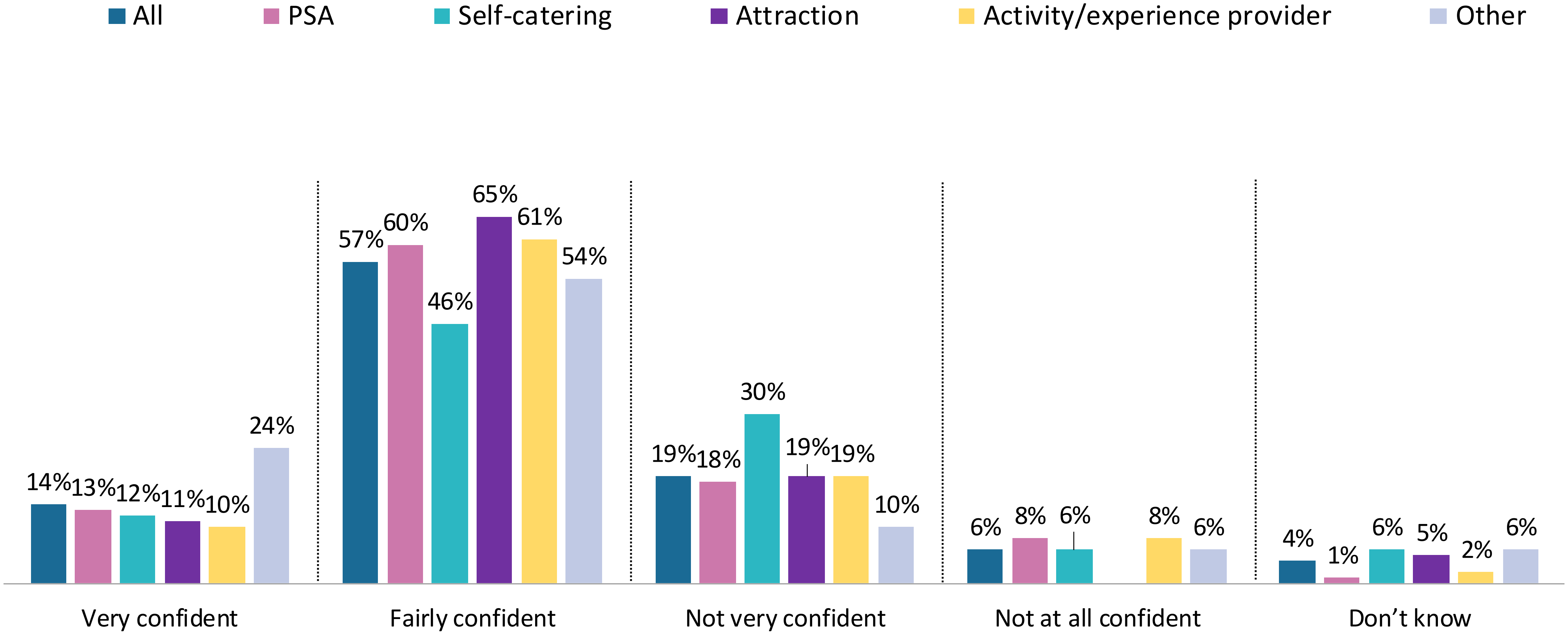

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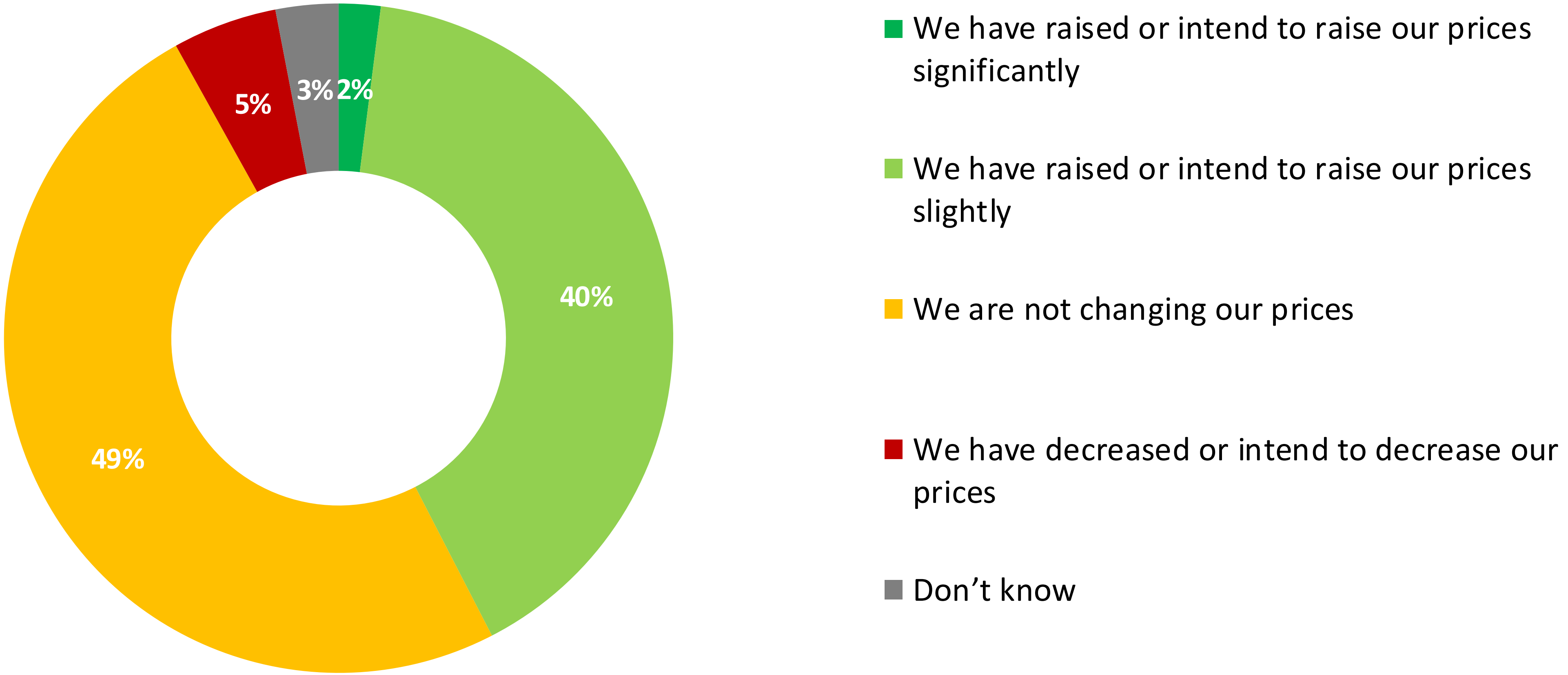
Q. How confident do you feel about running a tourism business profitably for the remainder of the year?

Base: all businesses (n=404); PSA (n=107); self-catering (n=81); attraction (n=57); activity/experience provider (n=89); other (n=70).

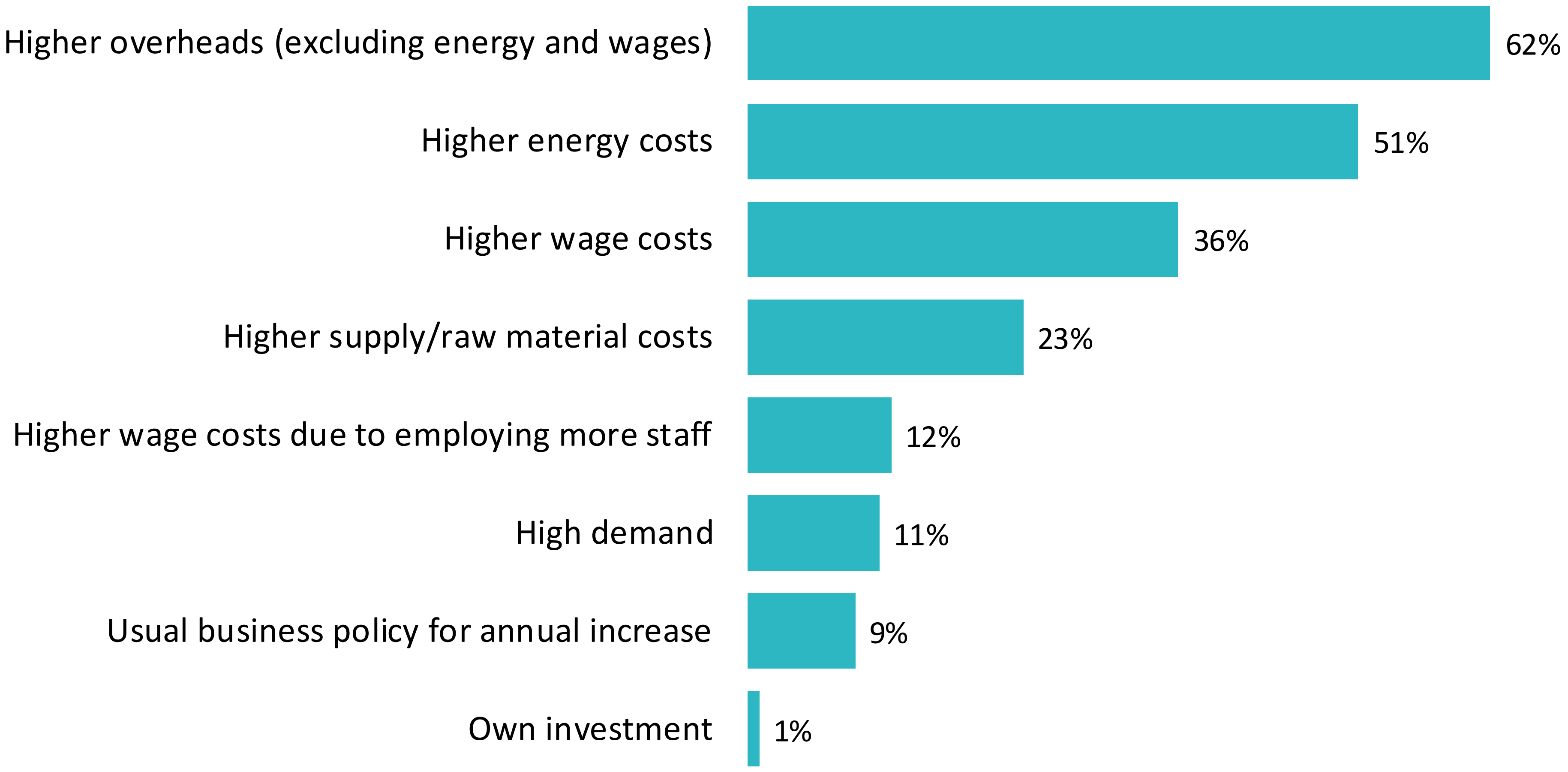
Changes in response to rising operating costs and the rising cost of living for consumers

Changed prices or intend to do so in response to rising operating costs and the rising cost of living for consumers



Q. In response to rising operating costs, but also taking into account the rising cost of living for consumers, have you or do you intend to change your prices for the rest of the year compared to what you would normally charge? *Base: all businesses (n=404).*

Reason for increasing prices



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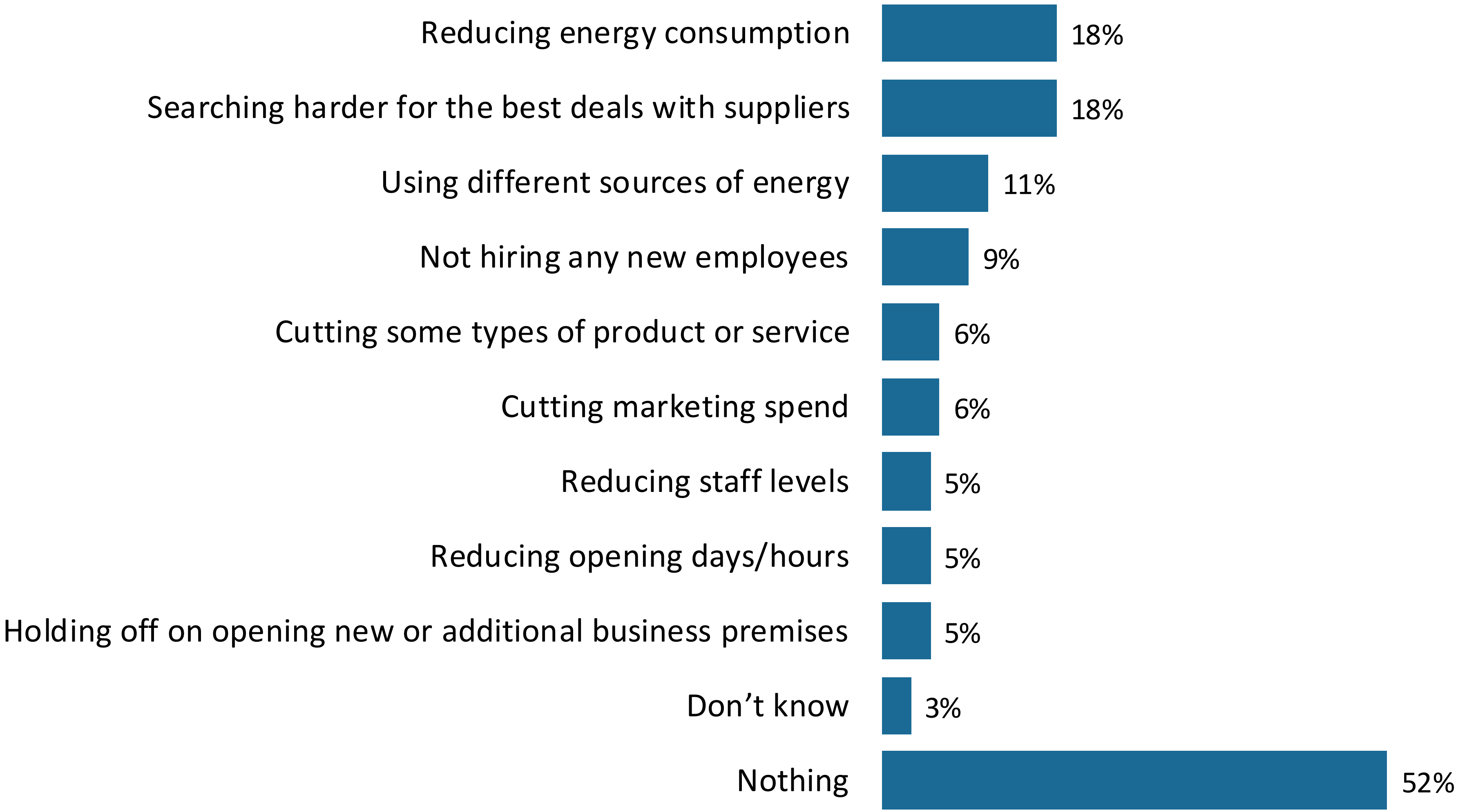
Q. Why have you/do you intend to increase your prices?
Base: all businesses that have or intend to increase their prices (n=169).

Other responses to rising operating costs



Q. Are you doing anything else in response to rising operating costs?
Base: all businesses (n=404).

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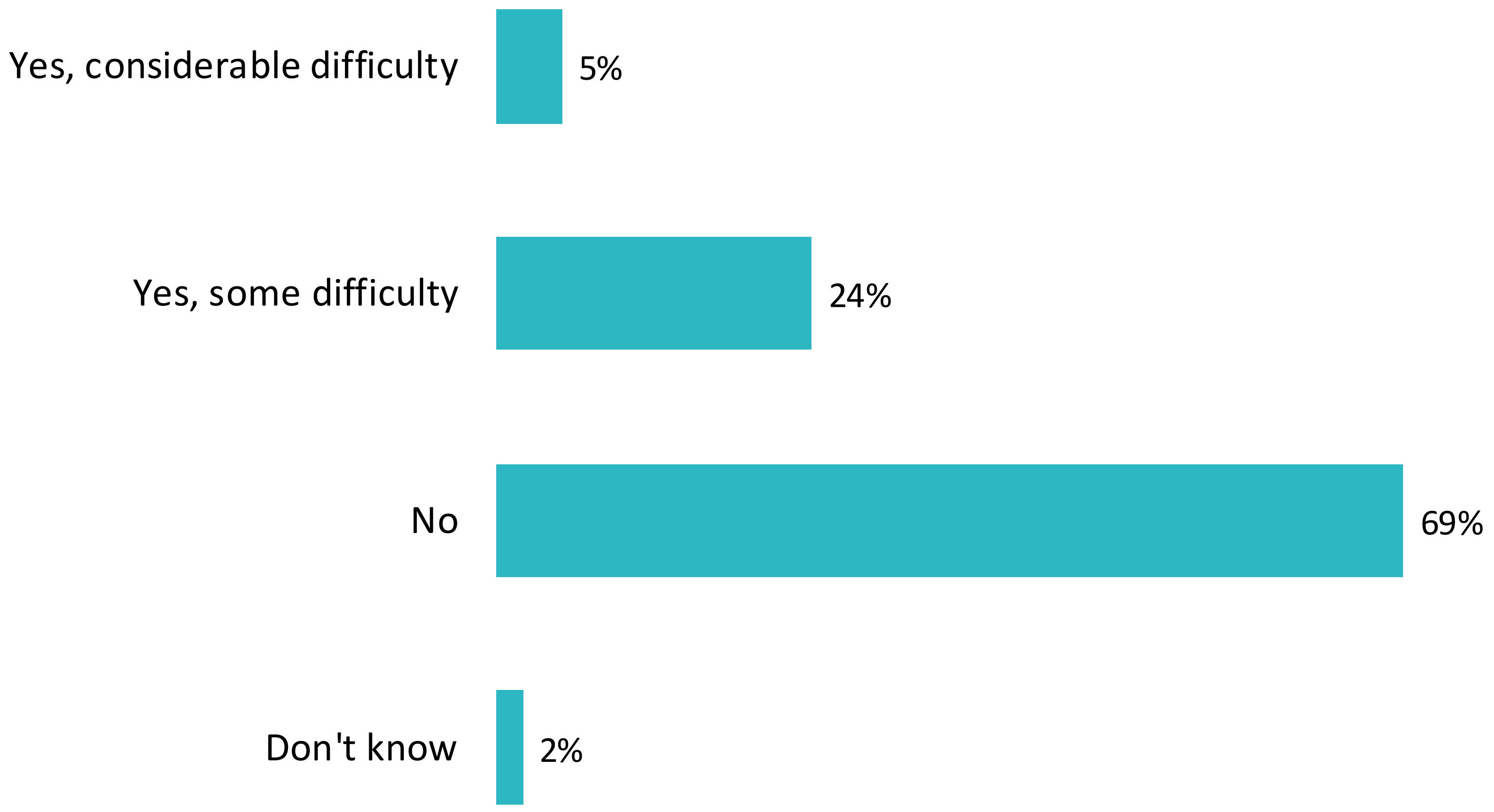
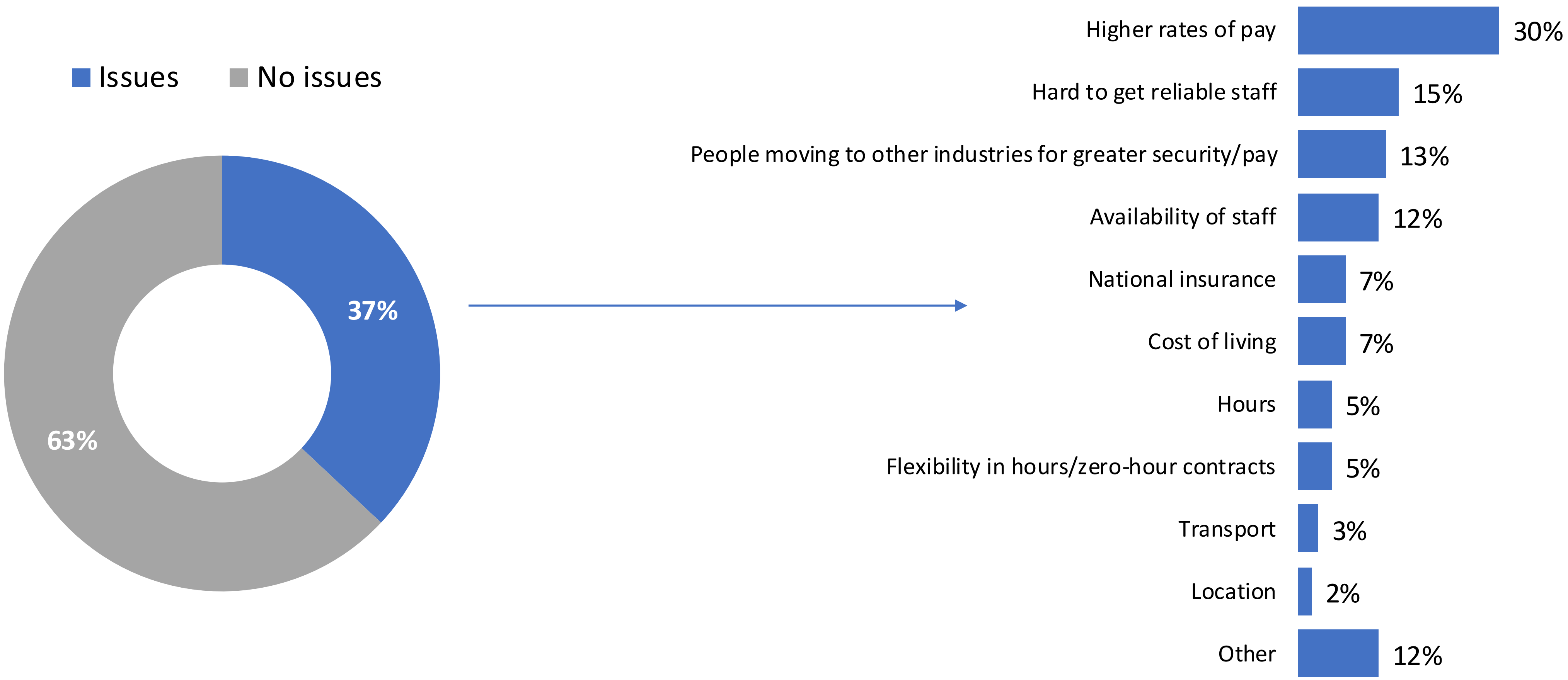
Staffing

Experiencing difficulties recruiting staff



Q. Are you experiencing any difficulties in recruiting the staff that you need?
Base: all businesses that employ staff (n=161).

Issues likely to affect staff recruitment and costs in future



Q. What issues do you feel are likely to affect your staff recruitment and staff costs in future?

Base: all businesses that employ staff (n=161); all businesses that employ staff that cited an issue (n=60).