Tourism NI Industry Survey

July 2026 Report

Research objectives, methodology and response by sector

Research objectives

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

- Monitor industry performance for the year to date (January-June 2026).
- Assess expectations for the summer period.
- Determine causes for concern regarding business this year.
- Help inform the development of future industry support.

Methodology

- Cognisense Ltd. conducted the survey and data analysis.

- A total of 418 businesses participated:

  104 online

  314 via telephone

- The fieldwork was administered 9 June to 4 July 2026.

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

Response by sector

Sector	Responses (% of sample)
Accommodation provider	151(36%)
Activity/experience provider	93 (22%)
Attraction	67 (16%)
Golf club	35 (8%)
Tour operator	30 (7%)
Carrier/transport provider	9 (2%)
Golf media/golf tour operator	5 (1%)
Event organiser	4 (1%)
Food and drink	3 (1%)
Other	21 (5%)
Total	**418**

Accommodation businesses make up 36% of the survey sample, with activity/experience providers representing 22% and attractions a further 16%.

TOURISM NORTHERN IRELAND

Q. What type of business do you run?
Base: all businesses (n=418).

Key findings

Overview

Overall, positive visitor volumes were reported for the first half of 2026, driven primarily by growth in the domestic, ROI and GB markets. A largely stable performance was noted for international visitors, although around two in ten businesses experienced a decline across these markets.

While the outlook is generally optimistic for the July-September 2026 summer period, significant levels of concern remain regarding a number of key issues, including the impact of reduced disposable income and increased operating costs.

Strong visitor volumes overall, with events a key factor

Over half (55%) reported increased business volumes for January-June 2026 compared to the same period in 2025, while 16% experienced a decrease and 29% reported similar volumes.

Around half of businesses reported increased volumes from the domestic (50%) and ROI (48%) markets, while two-fifths (40%) saw growth from GB. Increases of between 20%-26% were highlighted from the USA, mainland Europe and rest of world markets. For each market, local events and festivals, and major headline events were reported as key factors influencing positive business performance.

For those businesses that reported a decrease in volume from the closer to home markets, the impact of the cost of living was the contributing factor most likely to be mentioned. For those that reported a downturn in overseas markets (excluding GB), the impact of global uncertainties on international travel and the expense of travelling to NI were the key factors highlighted.

Profitability to date encouraging, with high expectations for the summer months

- For around two in five (44%) businesses, profitability for January-June 2026 was above the level recorded for the corresponding period in 2025, with one-third (34%) reporting no change, and 17% noting a decrease in profitability.
- Half (50%) of businesses expect overall business volumes for July-September 2026 to be higher than for the same period in 2025, with 35% anticipating similar volumes, and 15% expecting a decrease.
- Positive online reviews, recommendations and repeat visitors are highlighted as reasons to be positive for the remainder of the year, alongside a robust programme of major and local events/ festivals. Continued destination marketing activity is also helping to support demand and sustain a positive outlook.

Continued confidence, despite the challenging operating environment

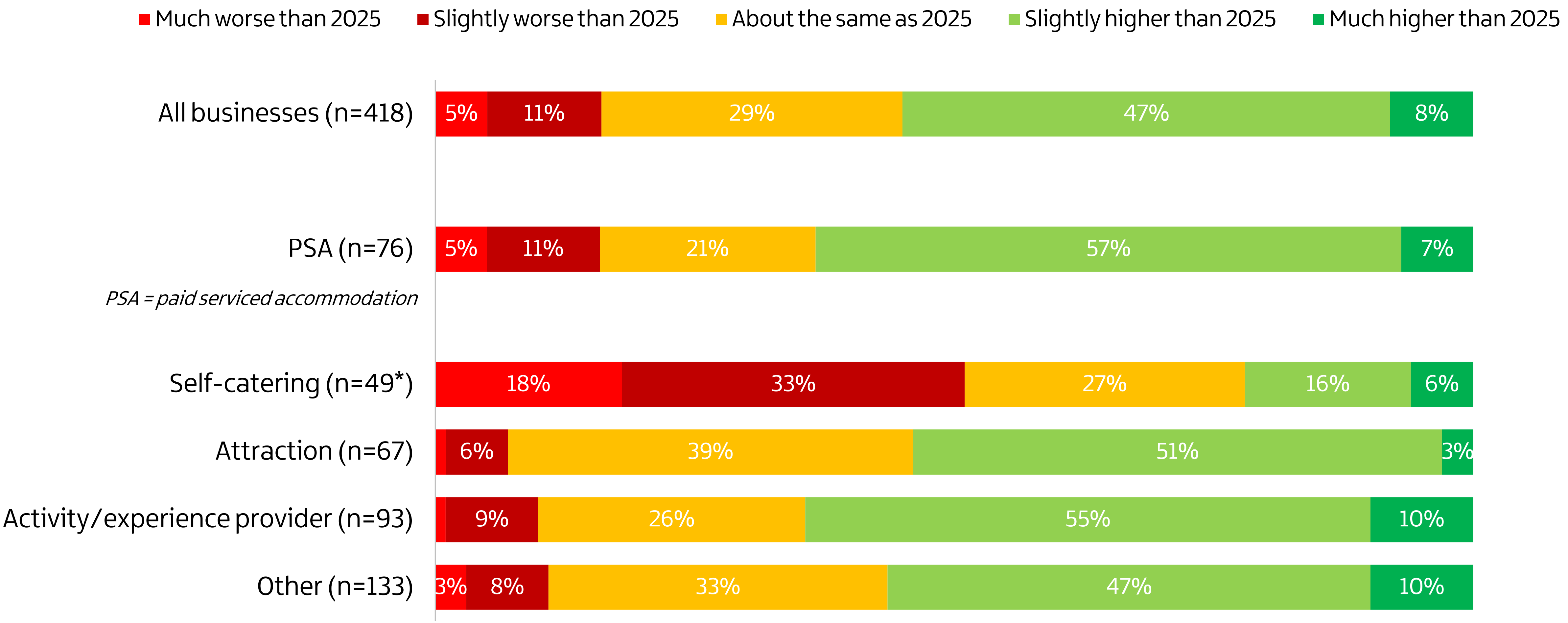
- While around four in five (79%) businesses feel confident about running their business profitably for the rest of the year, 13% are not confident, with a further 8% unsure.
- With outlook for the remainder of the year largely optimistic, key causes for concern remain, including reduced consumer disposable income and rising operating costs.
- Almost nine in ten (87%) businesses reported significant increases in operating costs this year, with the price of energy/ utilities and staff wages prominent challenges.

Staffing and geopolitical concerns but evidence of The Open legacy effect

- Around half of employers reported that they are experiencing some (48%) or considerable (5%) difficulty in recruiting the staff that they need.
- Almost 3 in 10 businesses are concerned about the possible impact of the recent conflict in the Middle East on summer performance, with the USA the market most likely to be potentially negatively impacted.
- Over half of businesses with golf related revenue reported an increase in golf visitors as result of NI hosting The 153rd Open Championship in 2025, demonstrating the continued legacy effect of this major event.

Business performance:
January-June 2026

Business volume January-June 2026 *v same period in 2025*



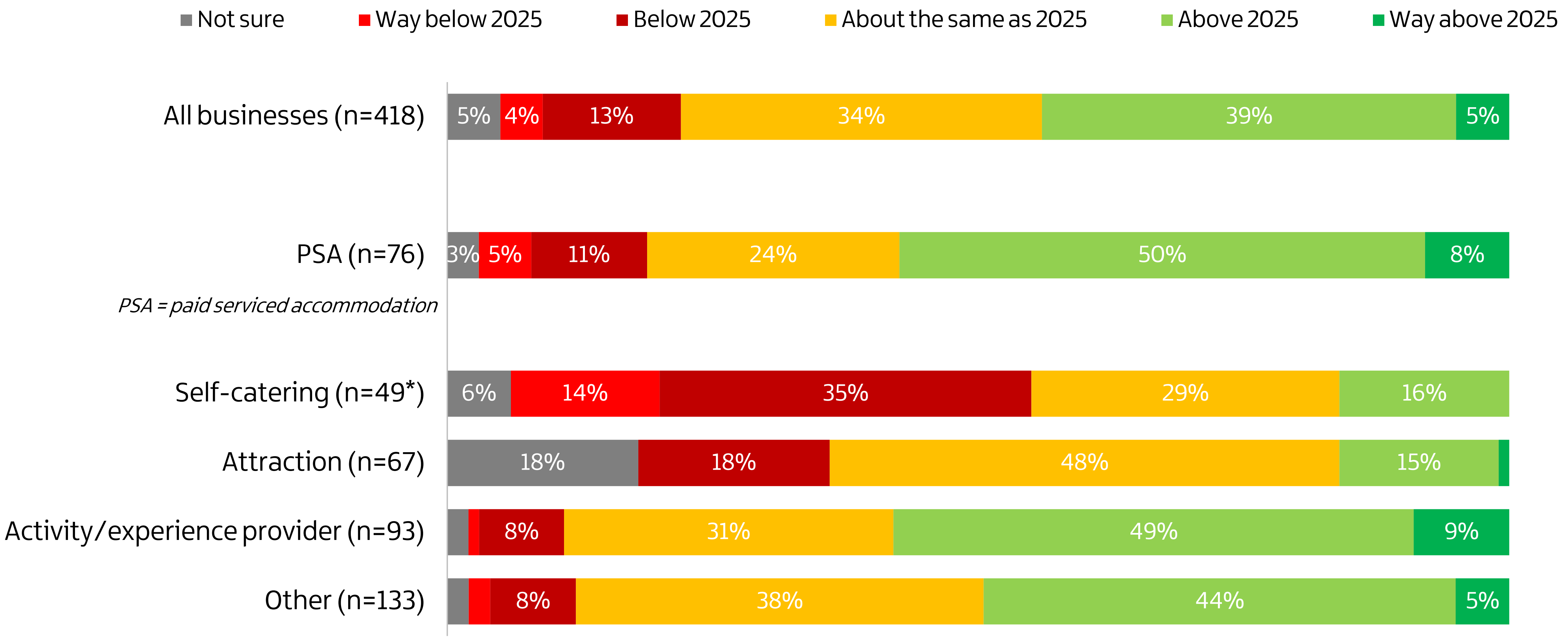
TOURISM NORTHERN IRELAND

Q. Thinking about the year to date (January to June 2026), how did the volume of your overall business compare with the same time in 2025?

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

*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

Profitability January-June 2026 *v same period in 2025*



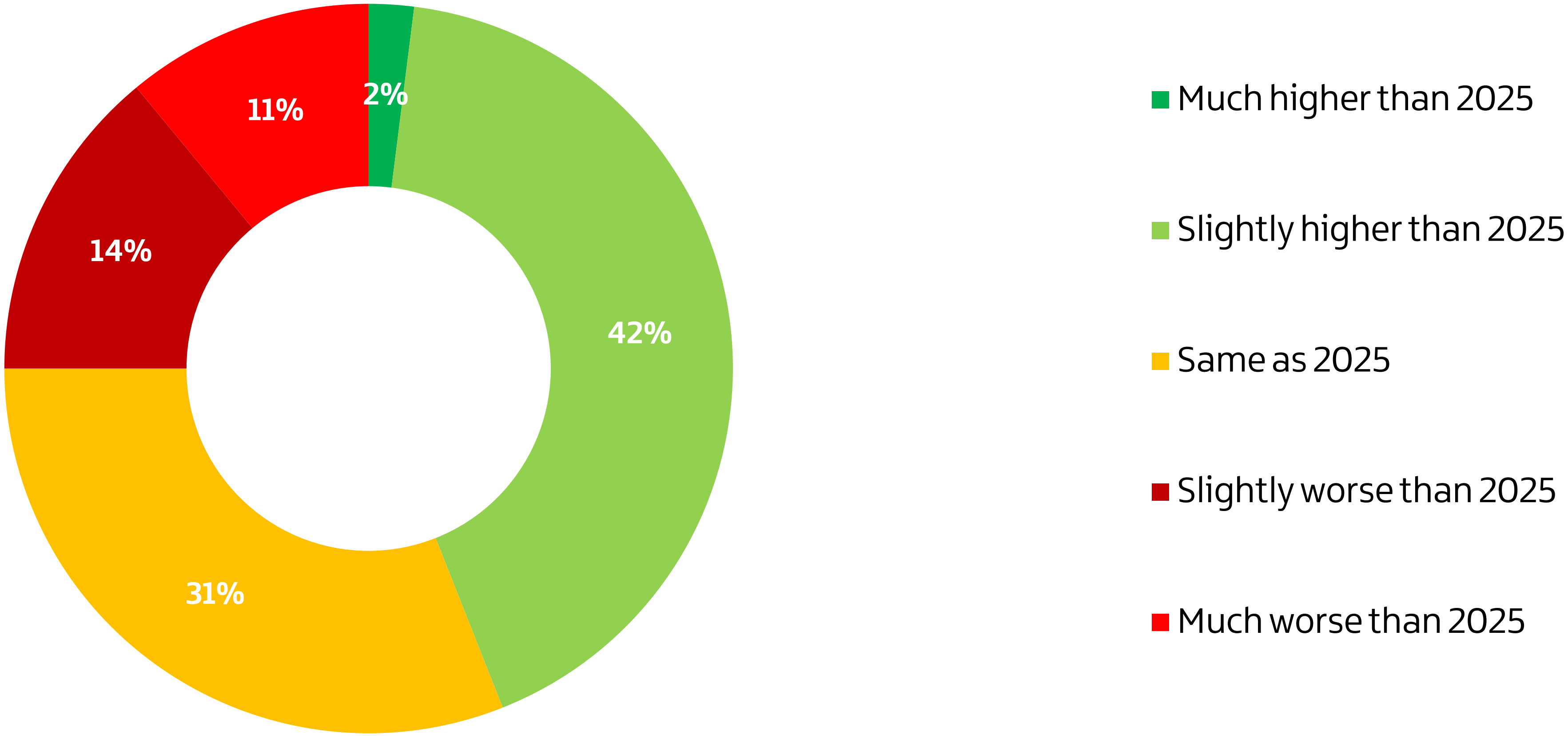
Q. Thinking about the year to date (January to June 2026), how did your business profitability compare with the same period in 2025?

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

*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

TOURISM NORTHERN IRELAND

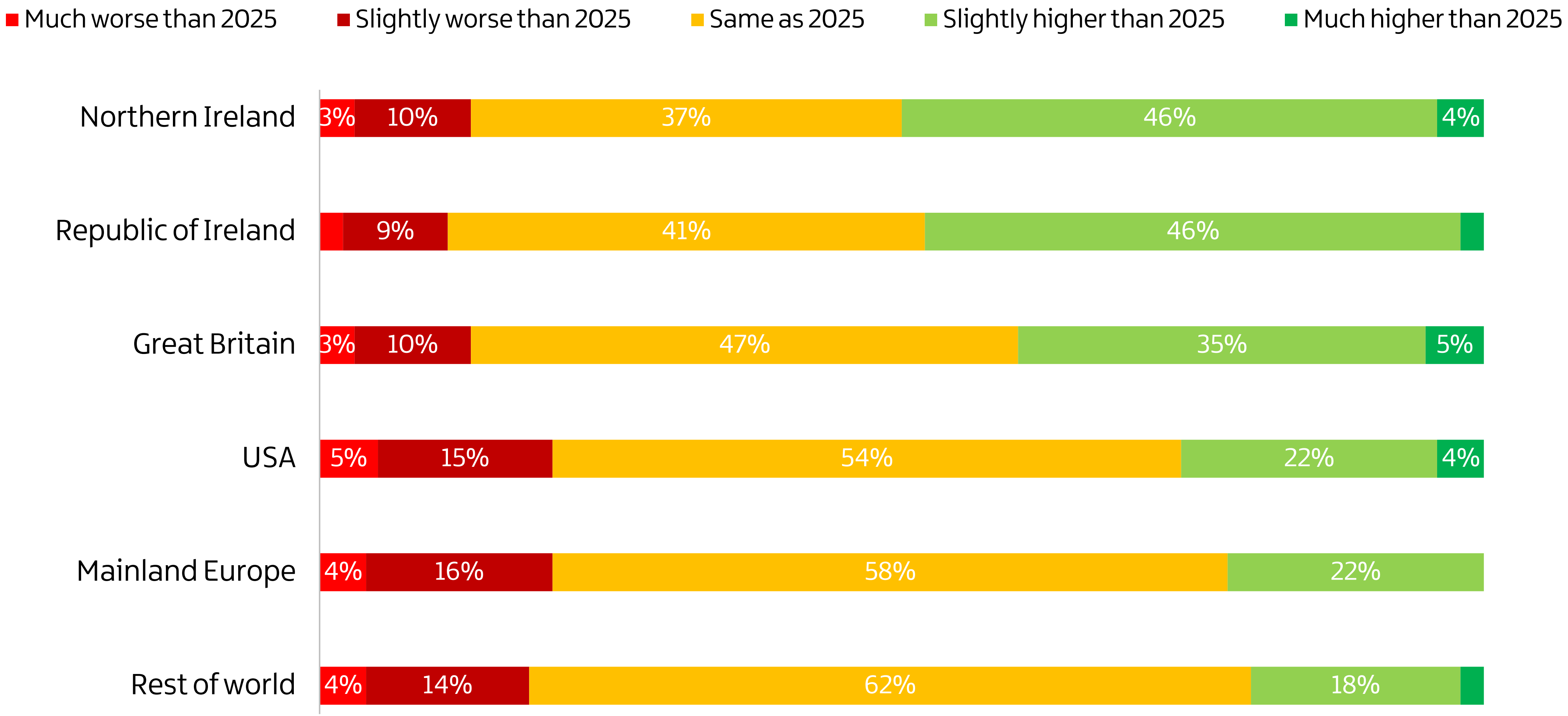
Average room yield January-June 2026 *v same period in 2025*



Q. Thinking January to June 2026, how does your average room yield compare to the same time in 2025?
Base: all accommodation providers (n=151).

Business performance:
January-June 2026 by market

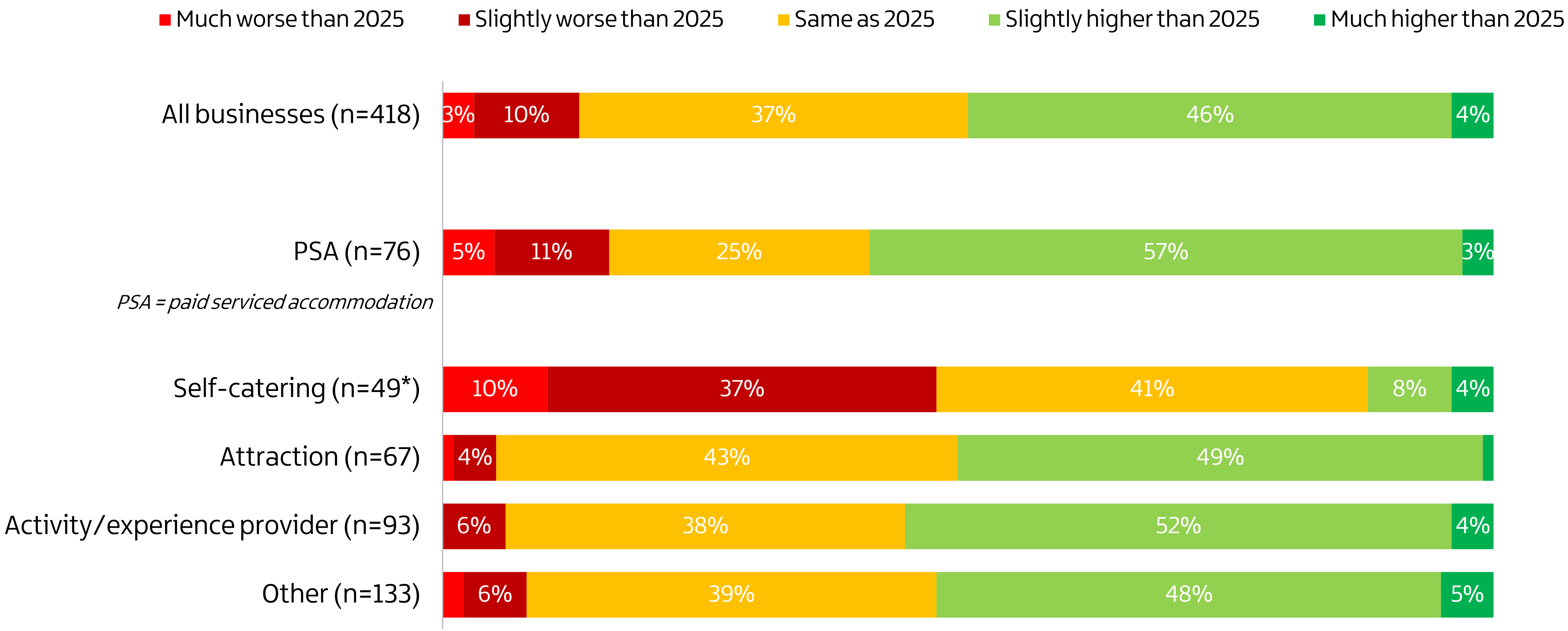
Volume of business January-June 2026 *v same period in 2025*: market summary



TOURISM NORTHERN IRELAND

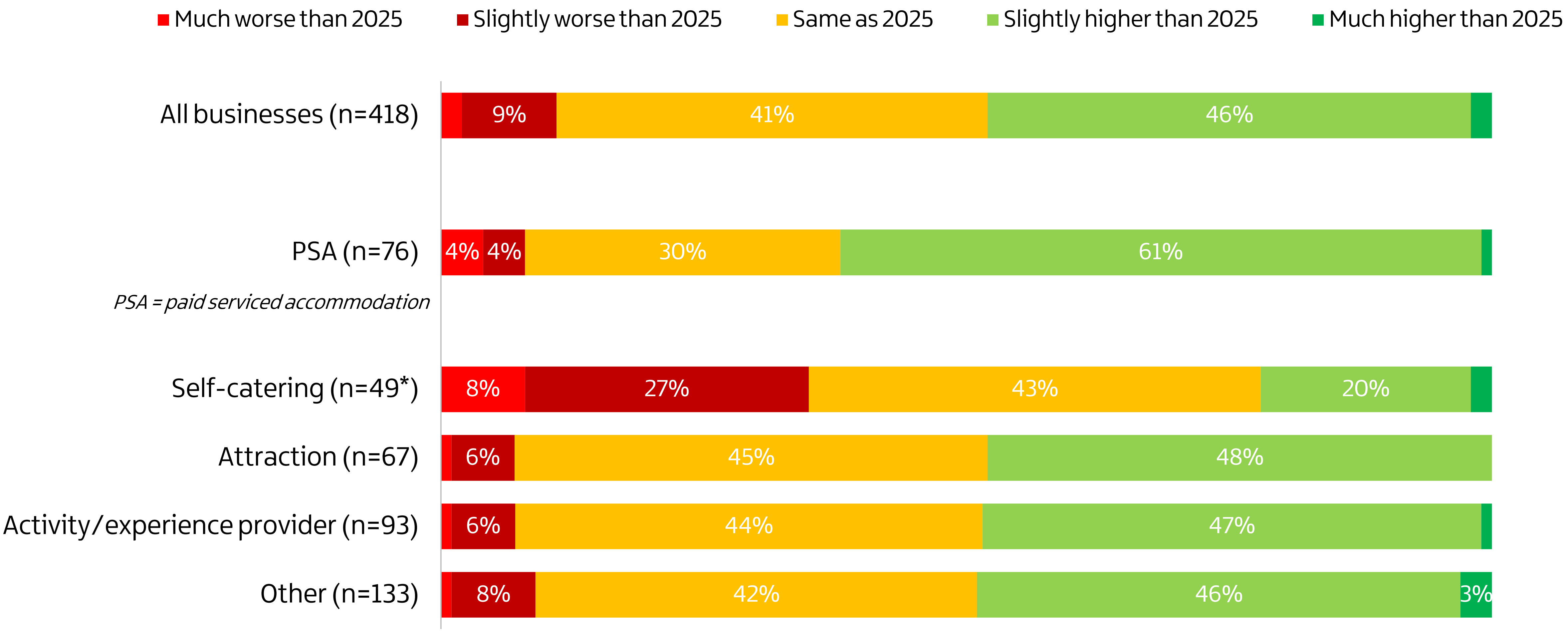
Q. Thinking about January to June 2026, how did the volume of your overall business compare with the same time in 2025 for each of the following markets? *Base: all businesses (n=418). Note: each chart segment without a data label ≤ 2%.*

Volume of business January-June 2026 *v same period in 2025* for NI market



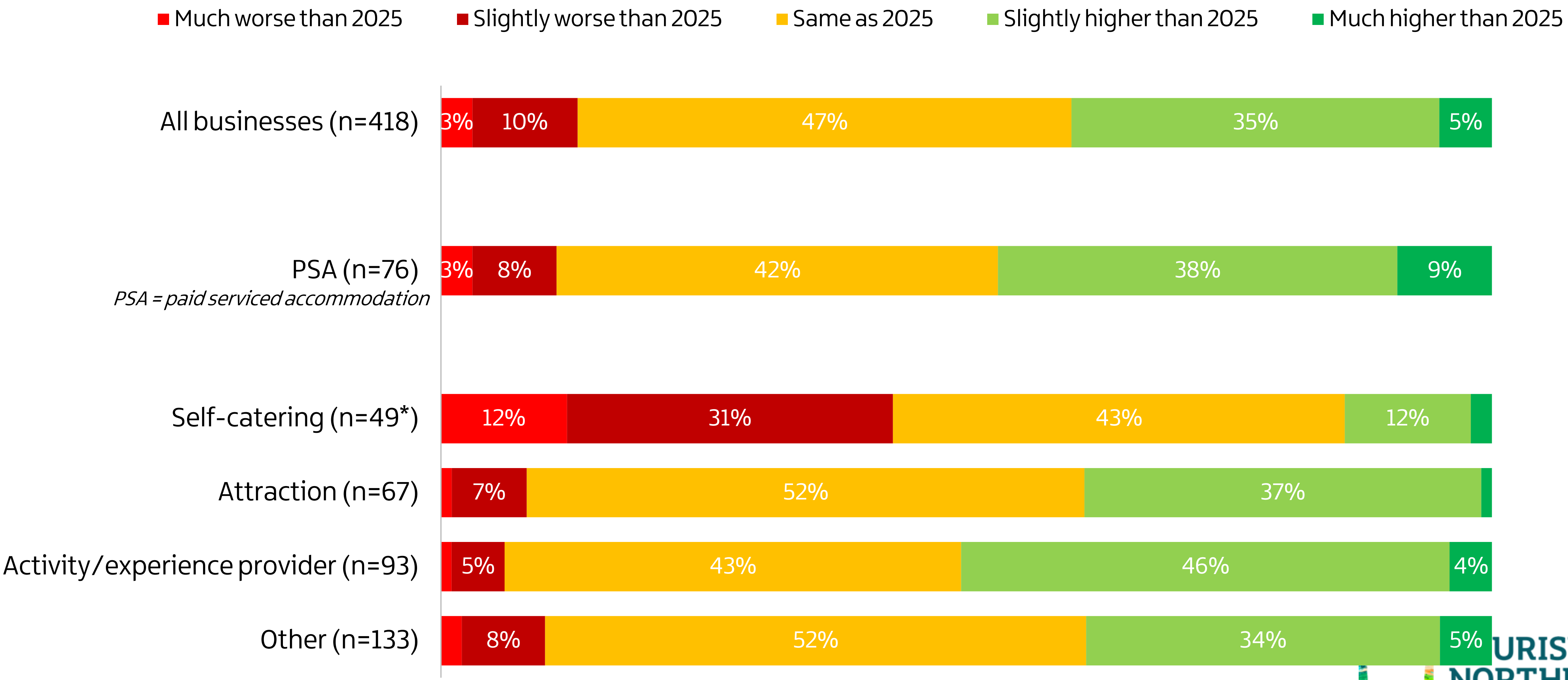
Q. Thinking about January to June 2026, how did the volume of your overall business compare with the same time in 2025 for the Northern Ireland market? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.*
*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution small base size*

Volume of business January-June 2026 *v same period in 2025* for ROI market



Q. Thinking about January to June 2026, how did the volume of your overall business compare with the same time in 2025 for the Republic of Ireland market? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.*
*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

Volume of business January-June 2026 *v same period in 2025* for GB market



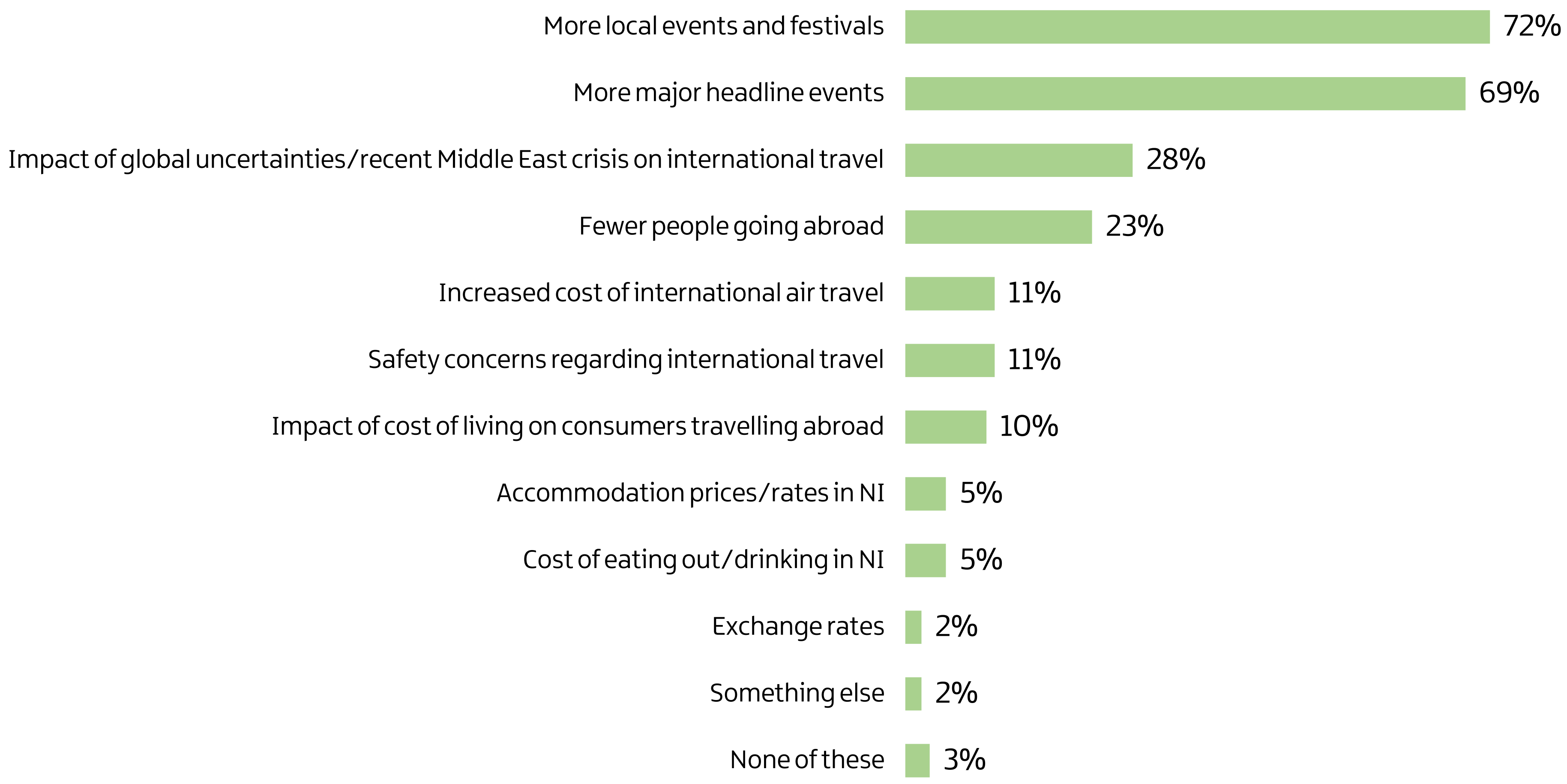
TOURISM NORTHERN IRELAND

Q. Thinking about January to June 2026, how did the volume of your overall business compare with the same time in 2025 for the Great Britain market?

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

*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

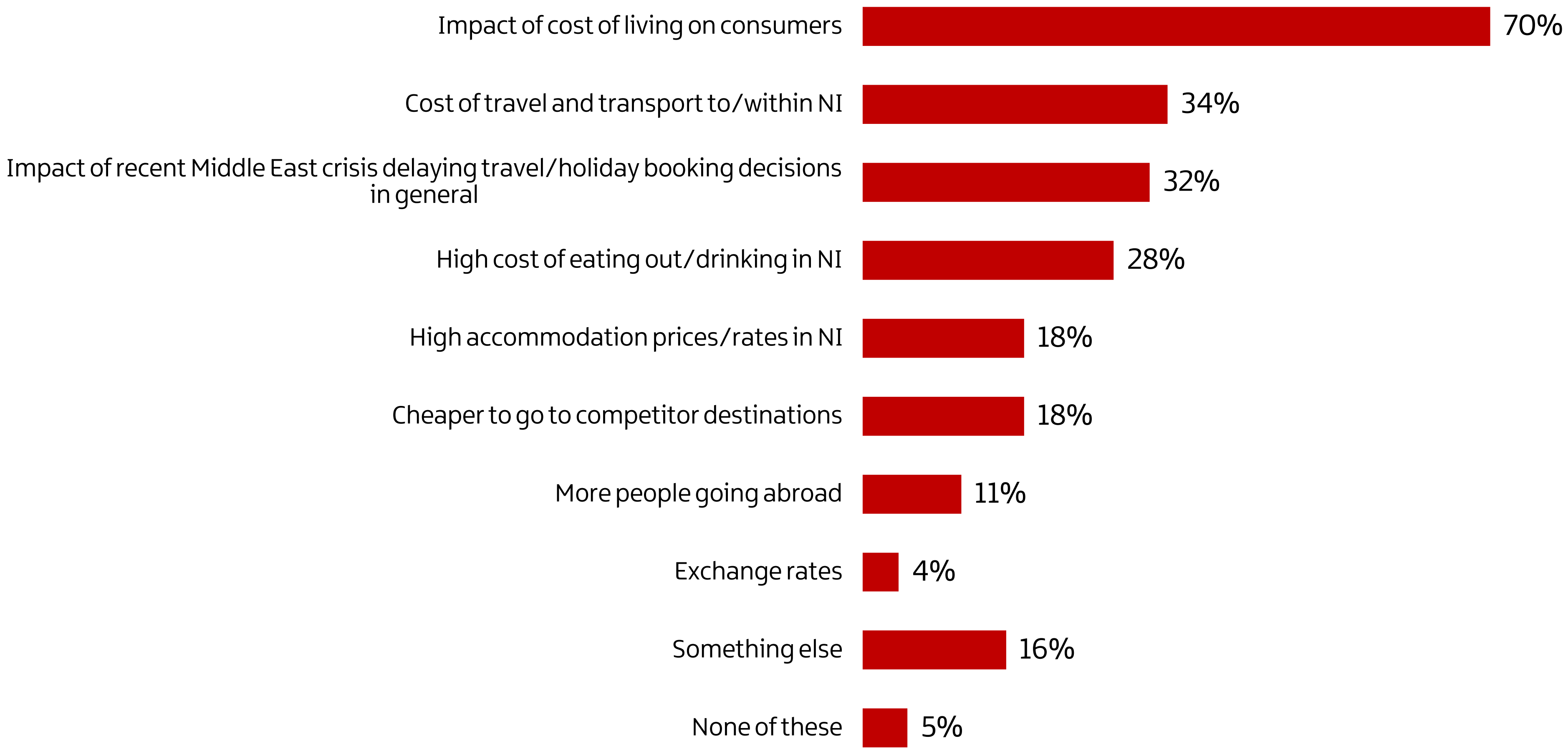
Factors having a positive impact on the volume of overall business from closer to home markets (NI, ROI and GB)



Q. Which, if any, of the following factors are having a positive impact on the volume of your overall business from the closer to home markets (NI, ROI and GB)?

Base: all businesses with higher NI, ROI and/or GB market performance for January to June 2026 compared to the previous year (n=253).

Factors having a negative impact on the volume of overall business from closer to home markets (NI, ROI and GB)

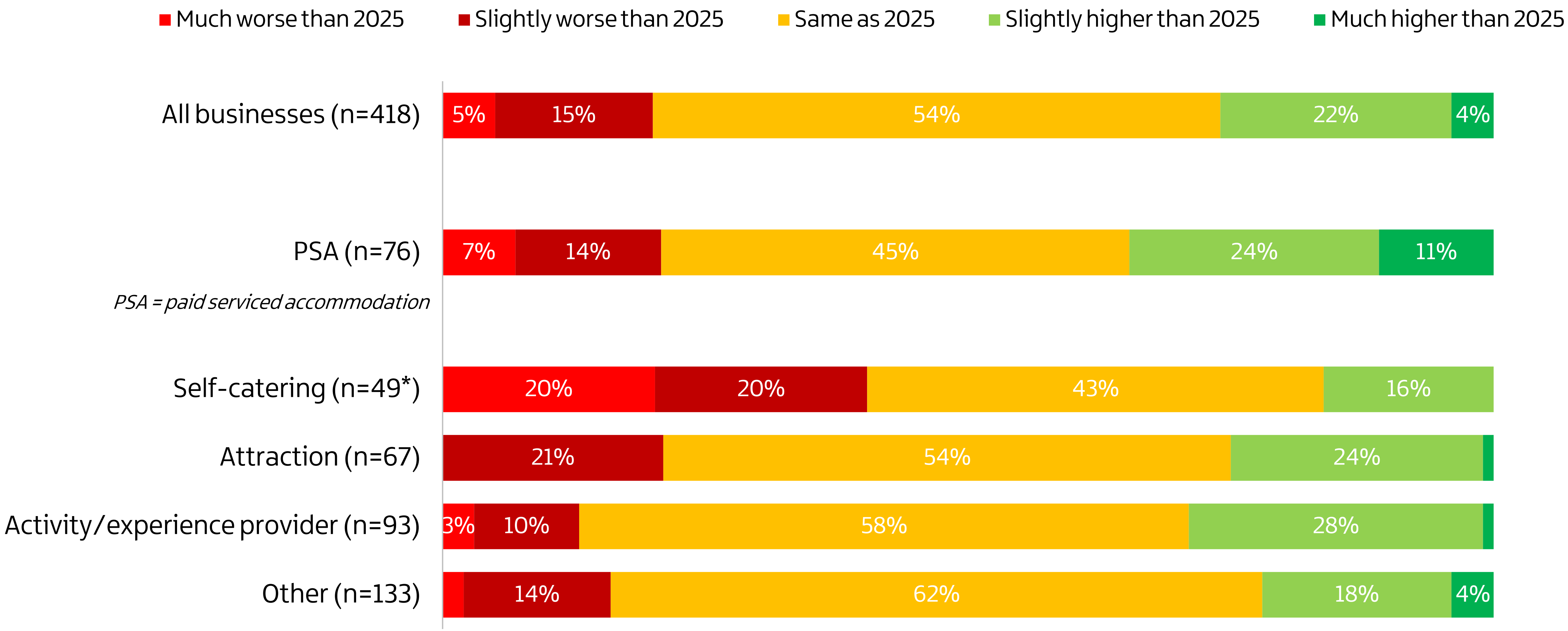


TOURISM NORTHERN IRELAND

Q. Which, if any, of the following factors are having a negative impact on the volume of your overall business from the closer to home markets (NI, ROI and GB)?

Base: all businesses with poorer NI, ROI and/or GB market performance for January to June 2026 compared to the previous year (n=79).

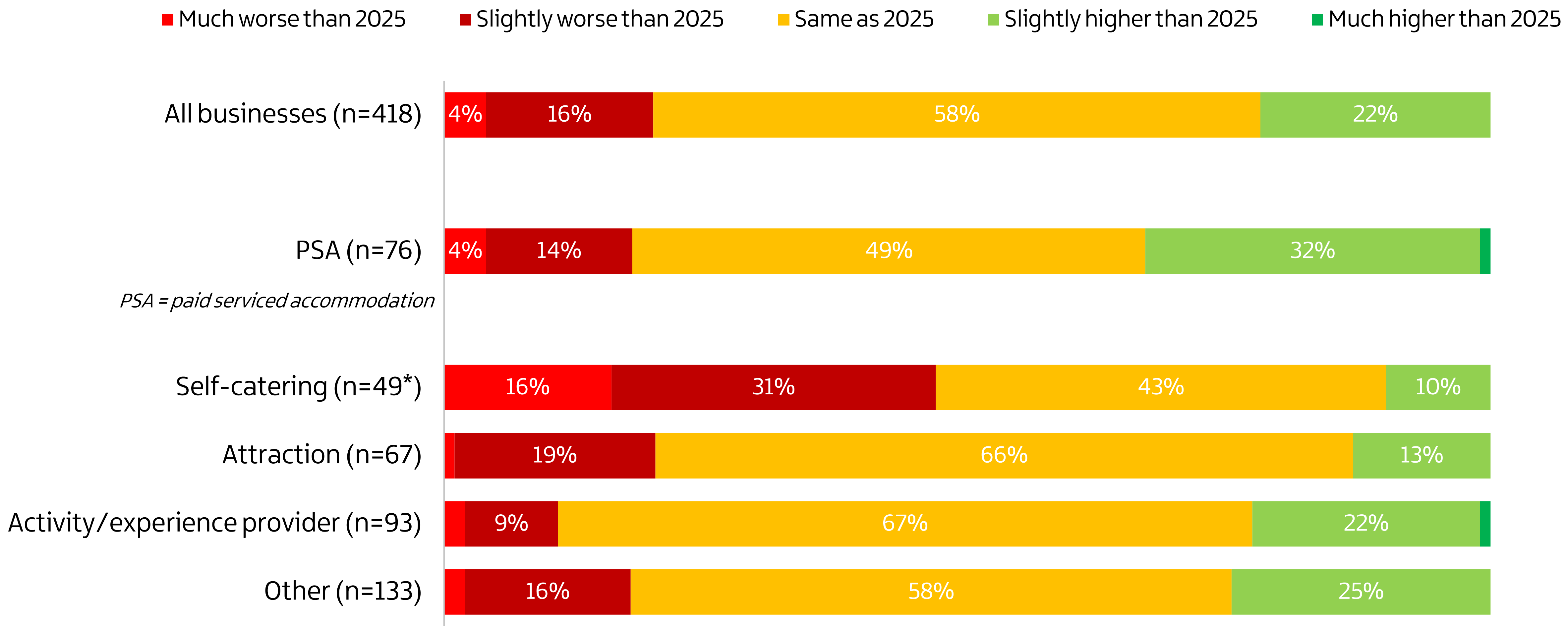
Volume of business January-June 2026 *v same period in 2025* for USA market



TOURISM NORTHERN IRELAND

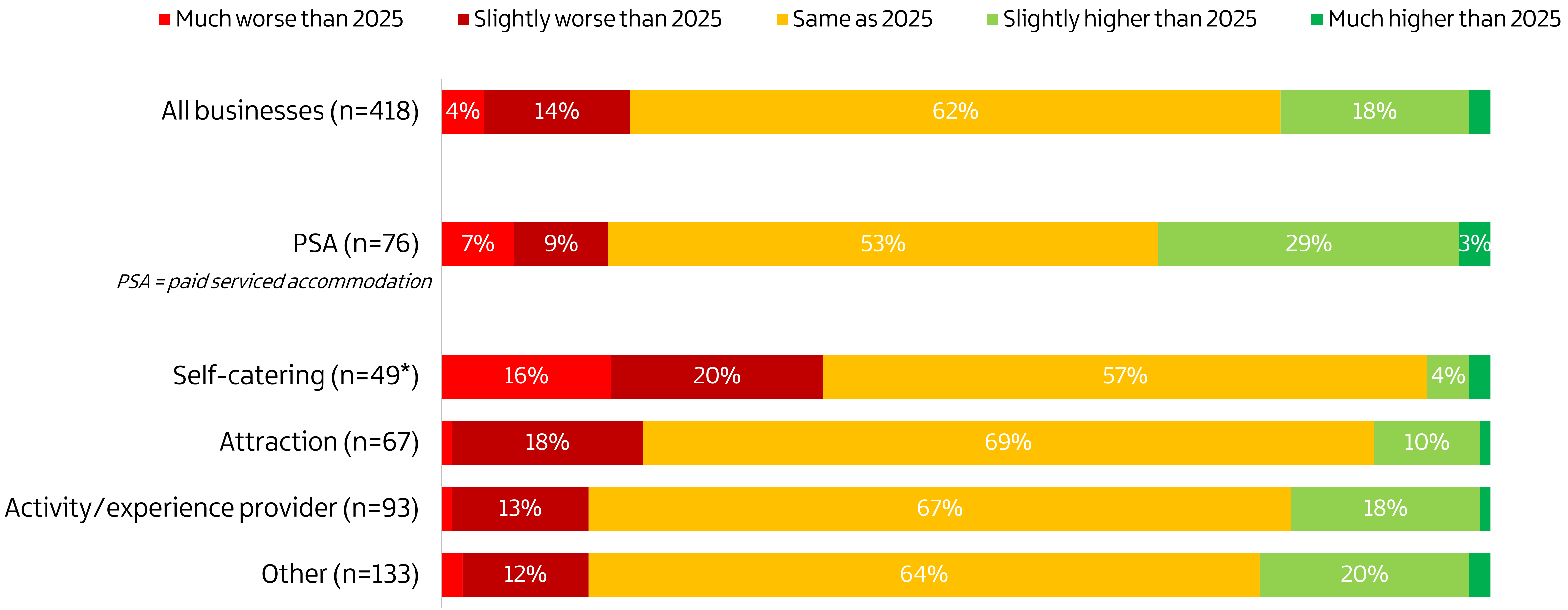
Q. Thinking about January to June 2026, how did the volume of your overall business compare with the same time in 2025 for the USA market? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%. PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation.*
**Caution: small base size.*

Volume of business January-June 2026 *v same period in 2025* for mainland Europe market



Q. Thinking about January to June 2026, how did the volume of your overall business compare with the same time in 2025 for the mainland Europe market? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%. PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

Volume of business January-June 2026 *v same period in 2025* for rest of world market

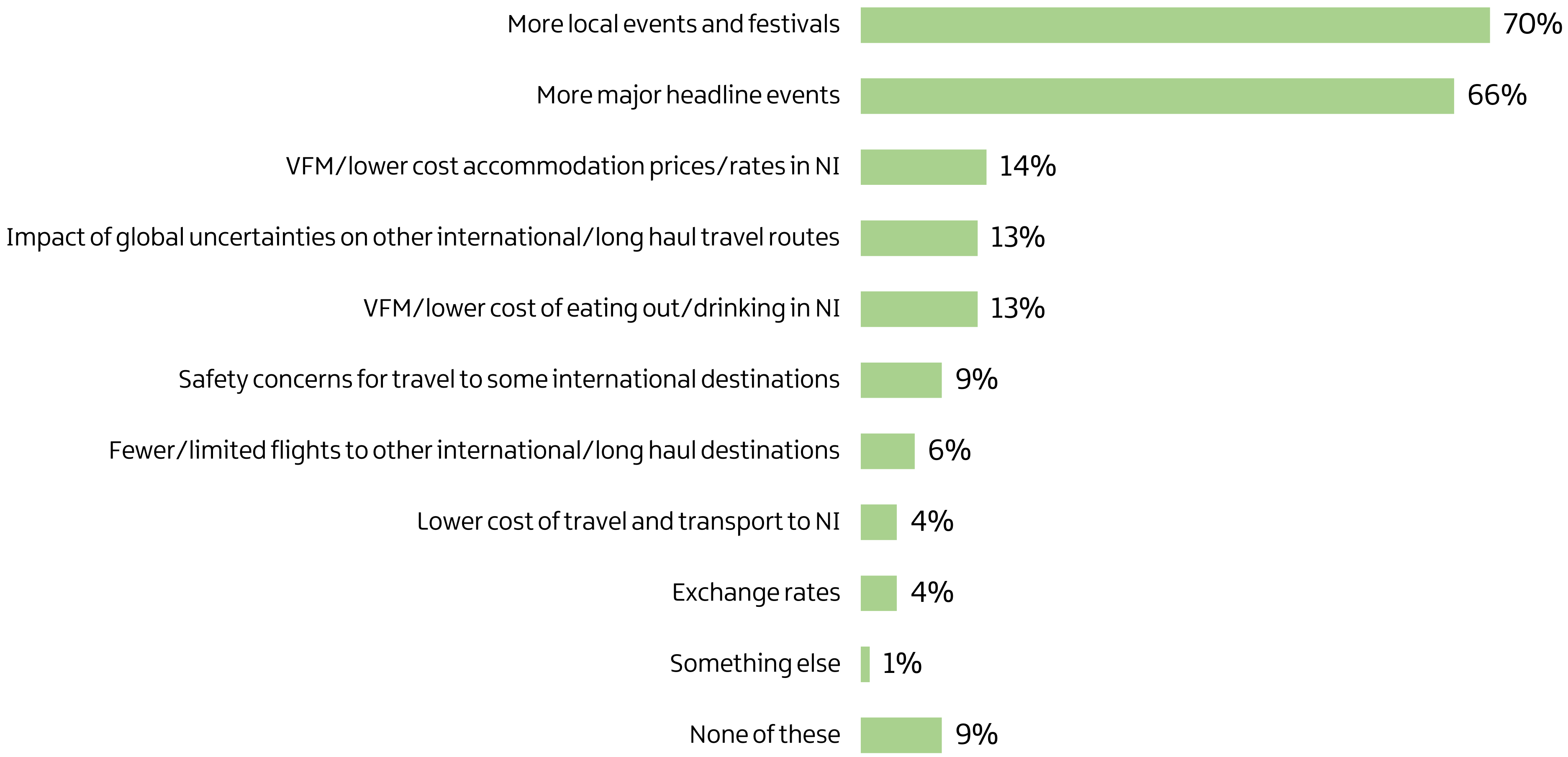


Q. Thinking about January to June 2026, how did the volume of your overall business compare with the same time in 2025 for the rest of world market?

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

*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

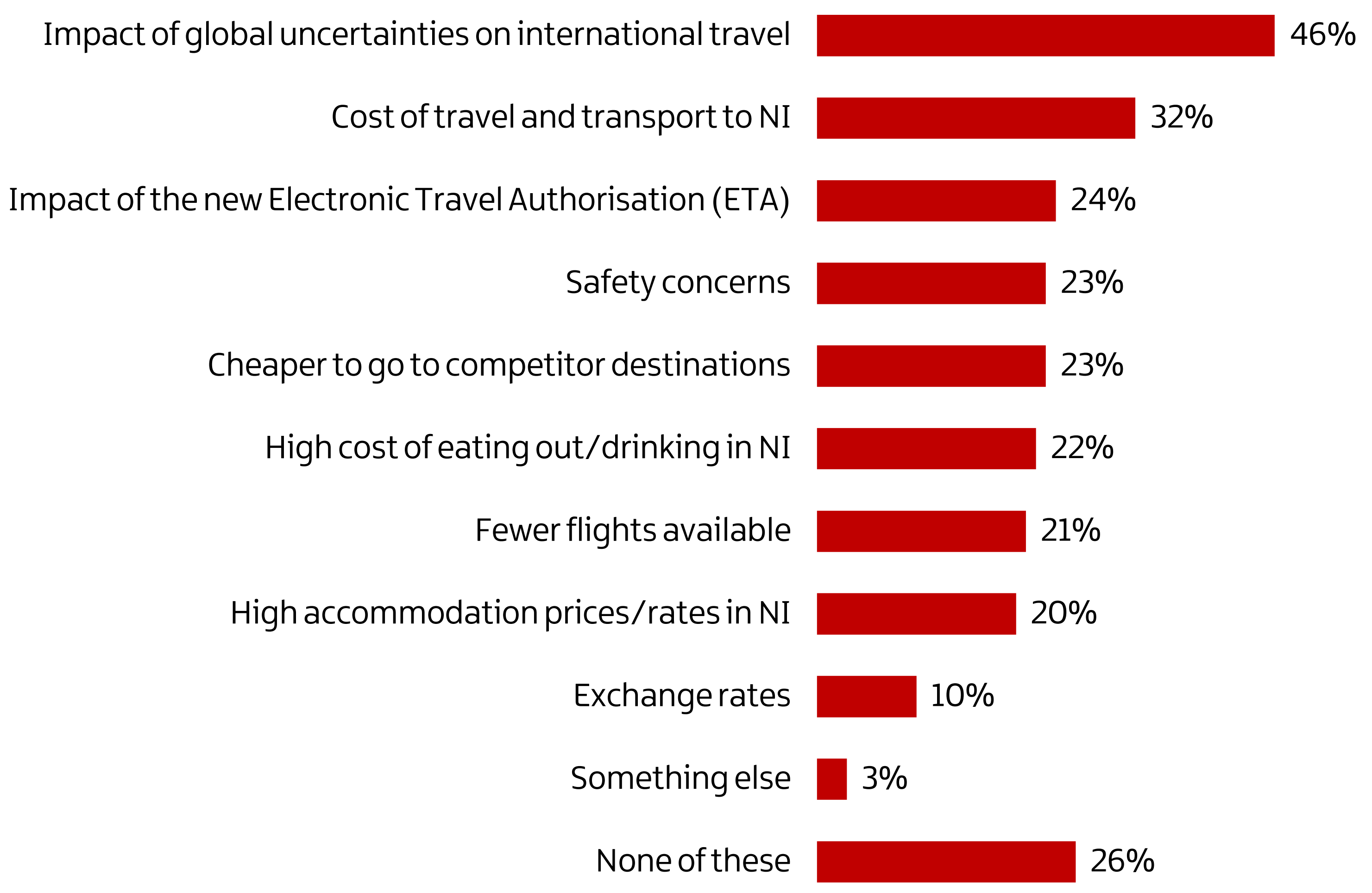
Factors having a positive impact on the volume of overall business from international markets (USA/ mainland Europe/ rest of world)



TOURISM NORTHERN IRELAND

Q. Which, if any, of the following factors are having a positive impact on the volume of your overall business from the international markets (USA, mainland Europe, rest of world)? *Base: all businesses with higher USA, mainland Europe and/or rest of world market performance for January to June 2026 compared to the previous year (n=137).*

Factors having a negative impact on the volume of overall business from international markets (USA/ mainland Europe/ rest of world)

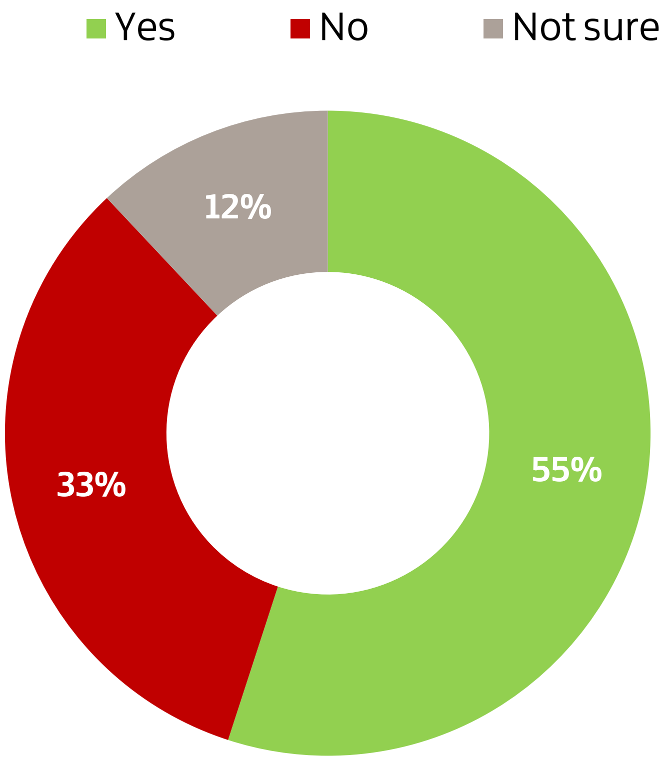


TOURISM NORTHERN IRELAND

Which, if any, of the following factors are having a negative impact on the volume of your overall business from the international markets (USA, mainland Europe, rest of world)? *Base: all businesses with poorer USA, mainland Europe and/or rest of world market performance for January to June 2026 compared to the previous year (n=105).*

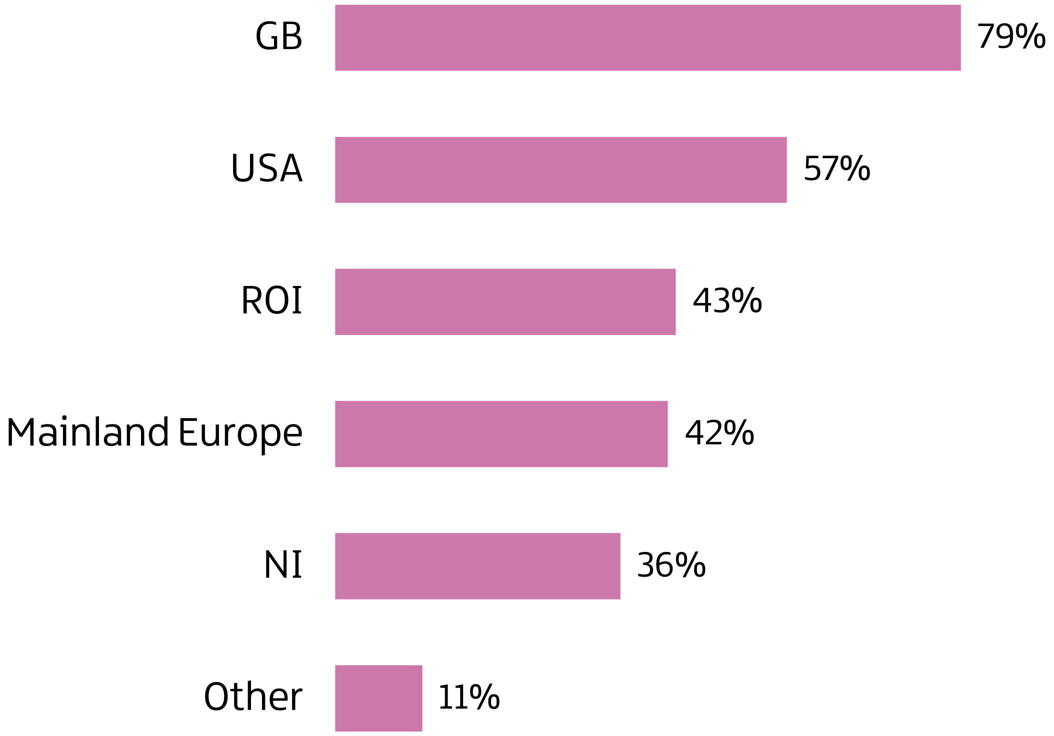
Golf visitors

Increase in visitors as a result of NI hosting The 153rd Open Championship at Royal Portrush in 2025



Q. Have you seen an increase in golf visitors this year as a result of Northern Ireland hosting The Open Championship at Royal Portrush in 2025?
Base: all businesses for whom revenue generated from golf visitors is important, excluding golf media/golf tour operators (n=199).

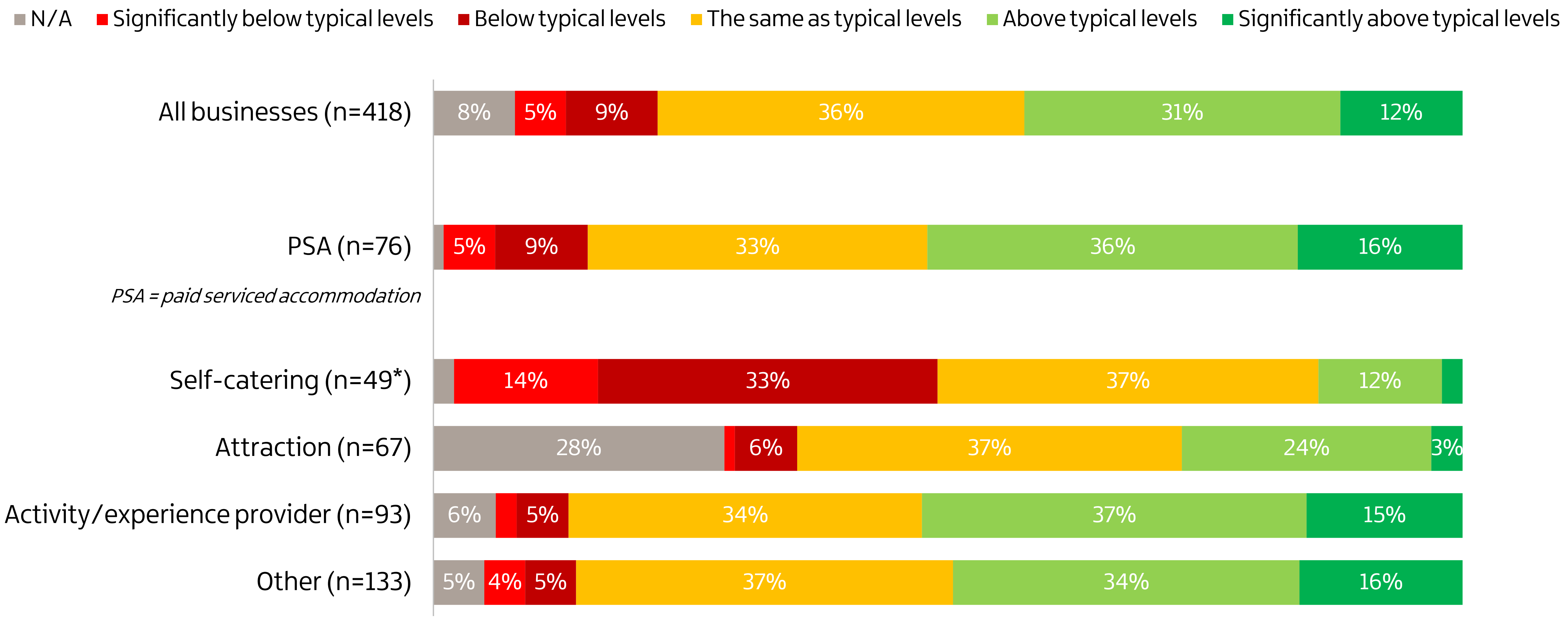
Increase in golf visitors from markets



Q. Have you seen an increase in golf visitors from any of the following markets?
Base: all businesses for whom revenue generated from golf visitors is important that have seen an increase in business as a result of the Open Championship being hosted in NI, excluding golf media/golf tour operators (n=110).

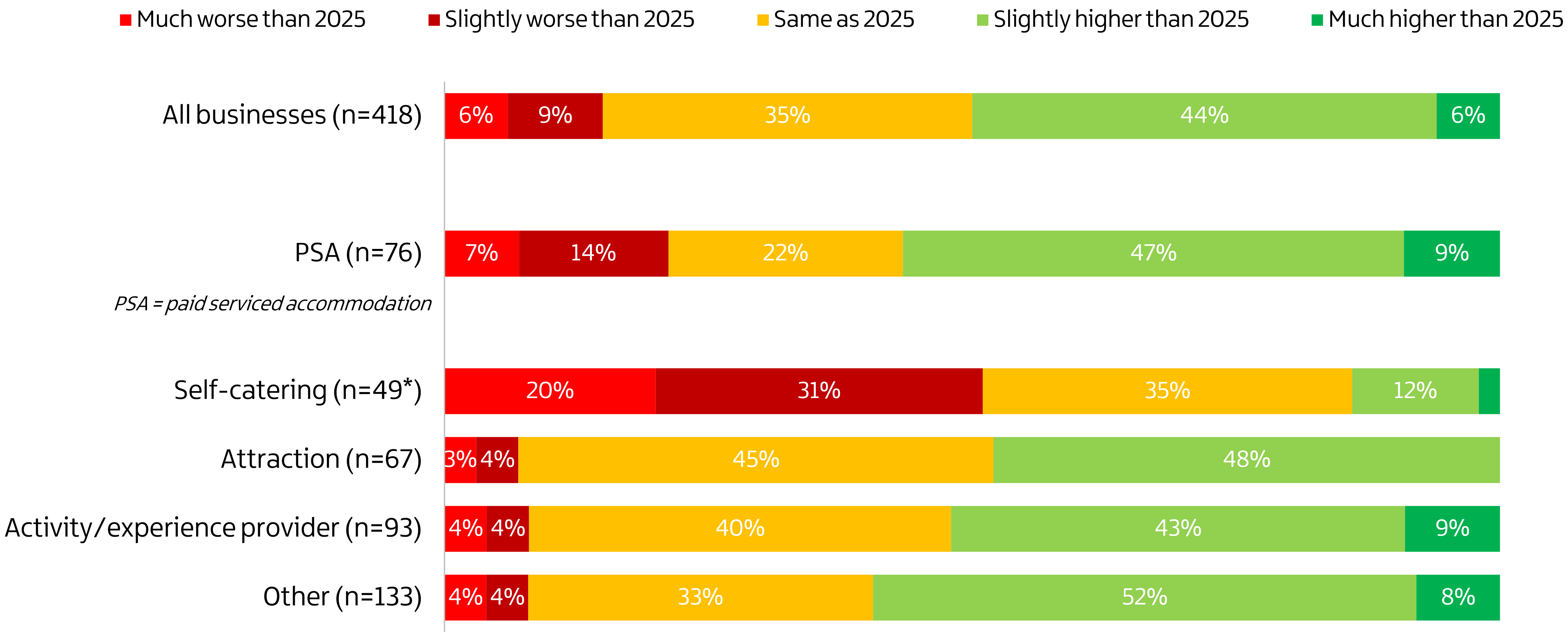
Advance bookings and expectations for the summer months (July-September 2026)

Advance bookings for July-September 2026 compared to normal



Q. How many advance bookings do you have for July to September 2026 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%.*
*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

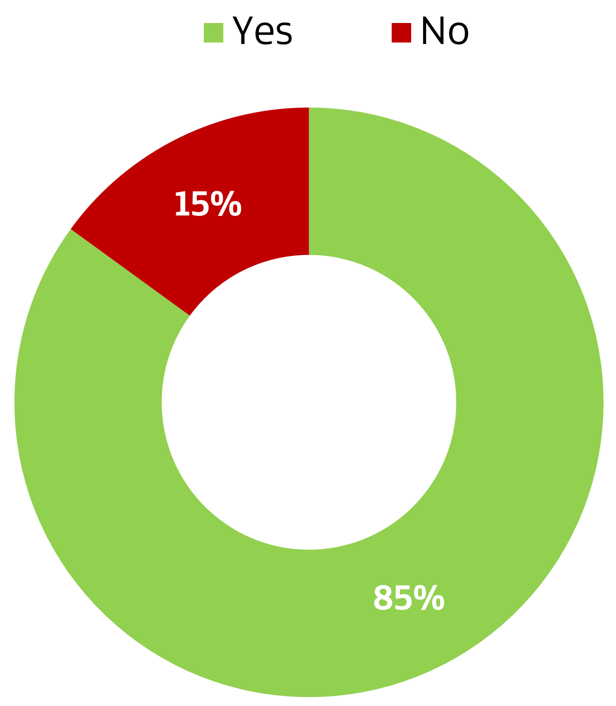
Volume of business expectations for July-September 2026 *v* same period in 2025



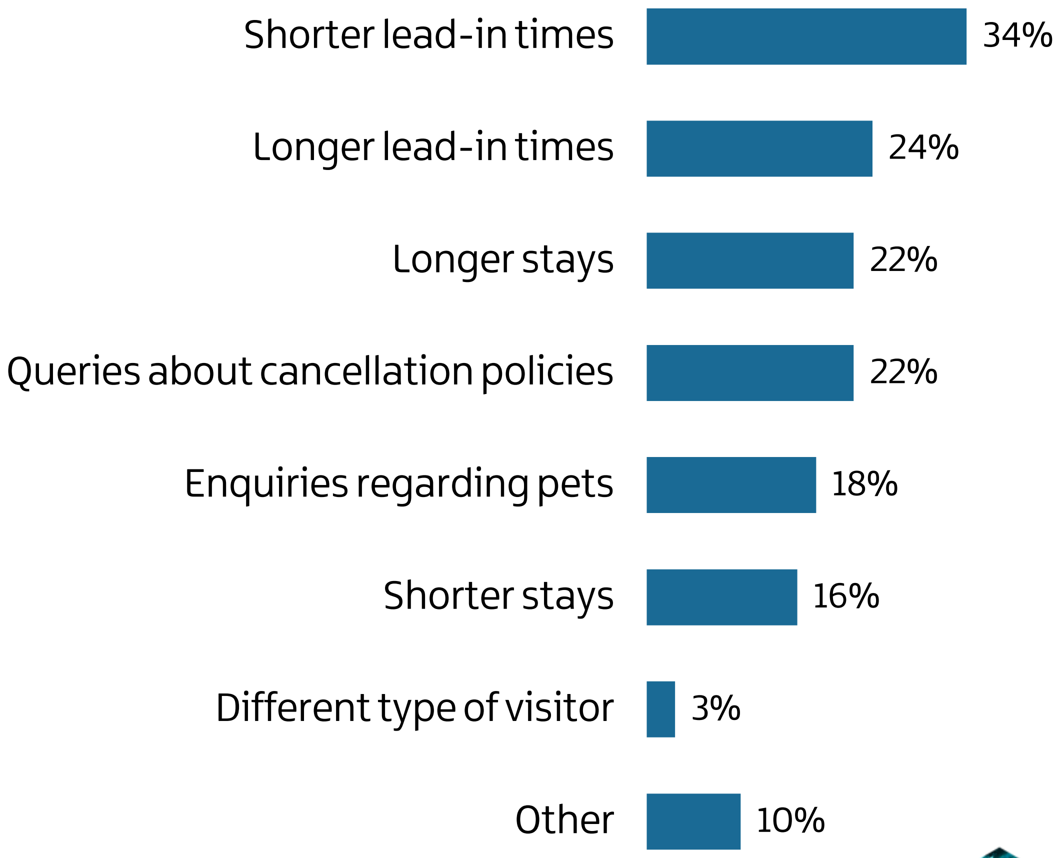
Q. Thinking about July to September 2026, how do you feel the volume of your overall business will compare with the same period in 2025? *Base: all businesses – sample sizes denoted on chart. Note: the chart segment without a data label = 2%.*
*PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

Flexible booking and trends for 2026

Offer flexible booking terms



Booking trends for 2026 that are different from normal



TOURISM NORTHERN IRELAND

Q. Do you offer flexible booking terms (such as free cancellation, opportunity to move booking)? *Base: all businesses (n=418).*

Q. Are there any booking trends you're noticing for 2026 that are different from normal? *Base: all businesses (n=418).*

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

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

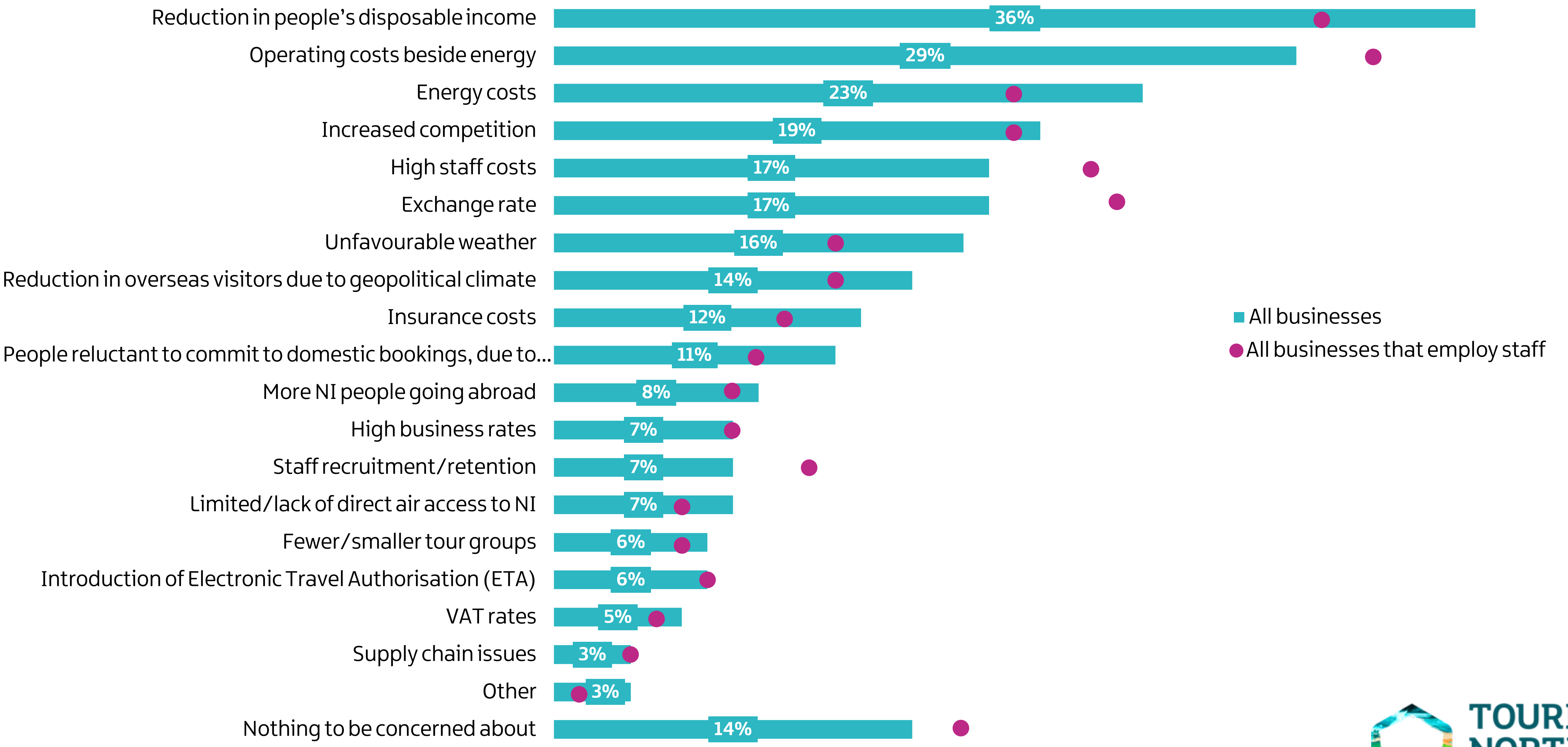
TOURISM NORTHERN IRELAND

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

Base: all businesses (n=418).

Causes for concern regarding business this year

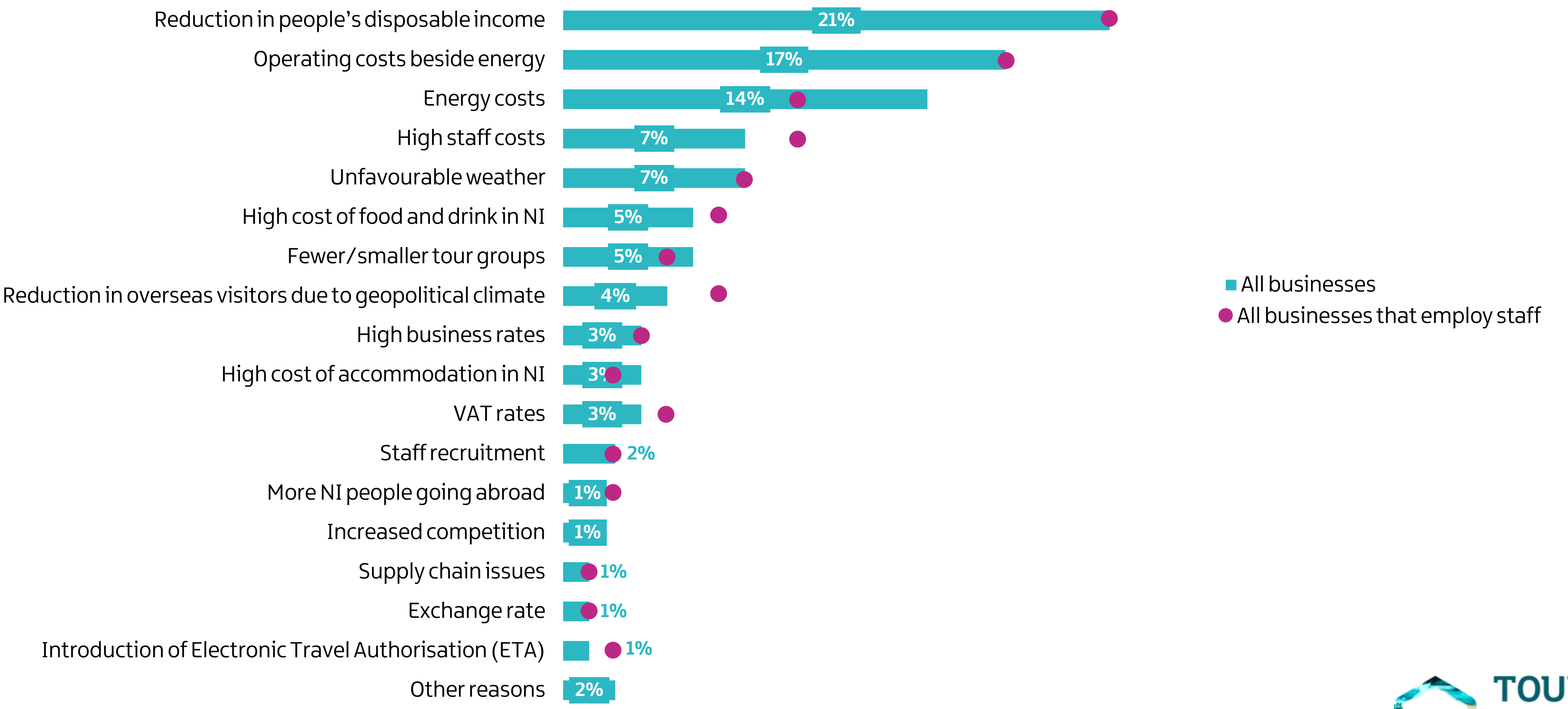
Causes for concern regarding business for this year



TOURISM NORTHERN IRELAND

Q. Are there any particular causes for concern regarding business this year?
Base: all businesses (n=418); all businesses that employ staff (n=306).

Causes for concern regarding business for the remainder of this year and for 2026 – ranked first

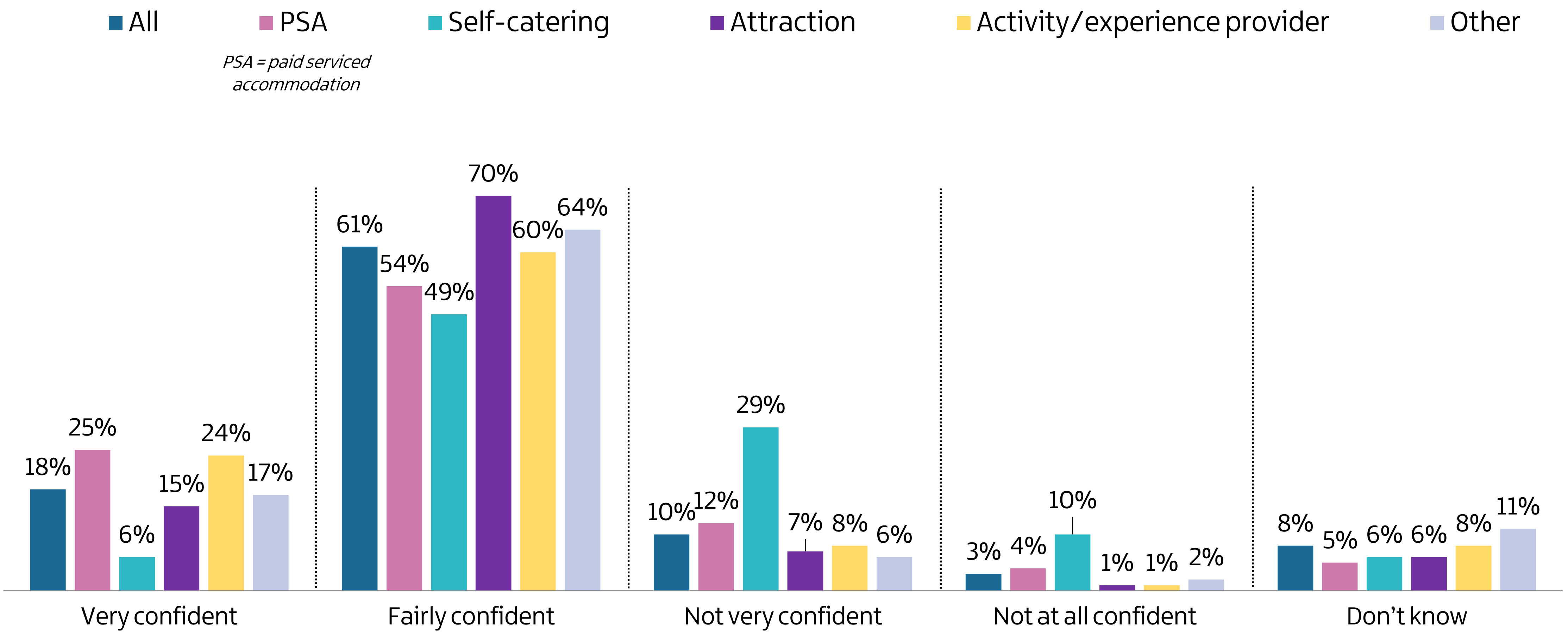


Q. Are there any particular causes for concern regarding business this year?

Base: all businesses with concerns (n=359); all businesses with concerns that employ staff (n=258).

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

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



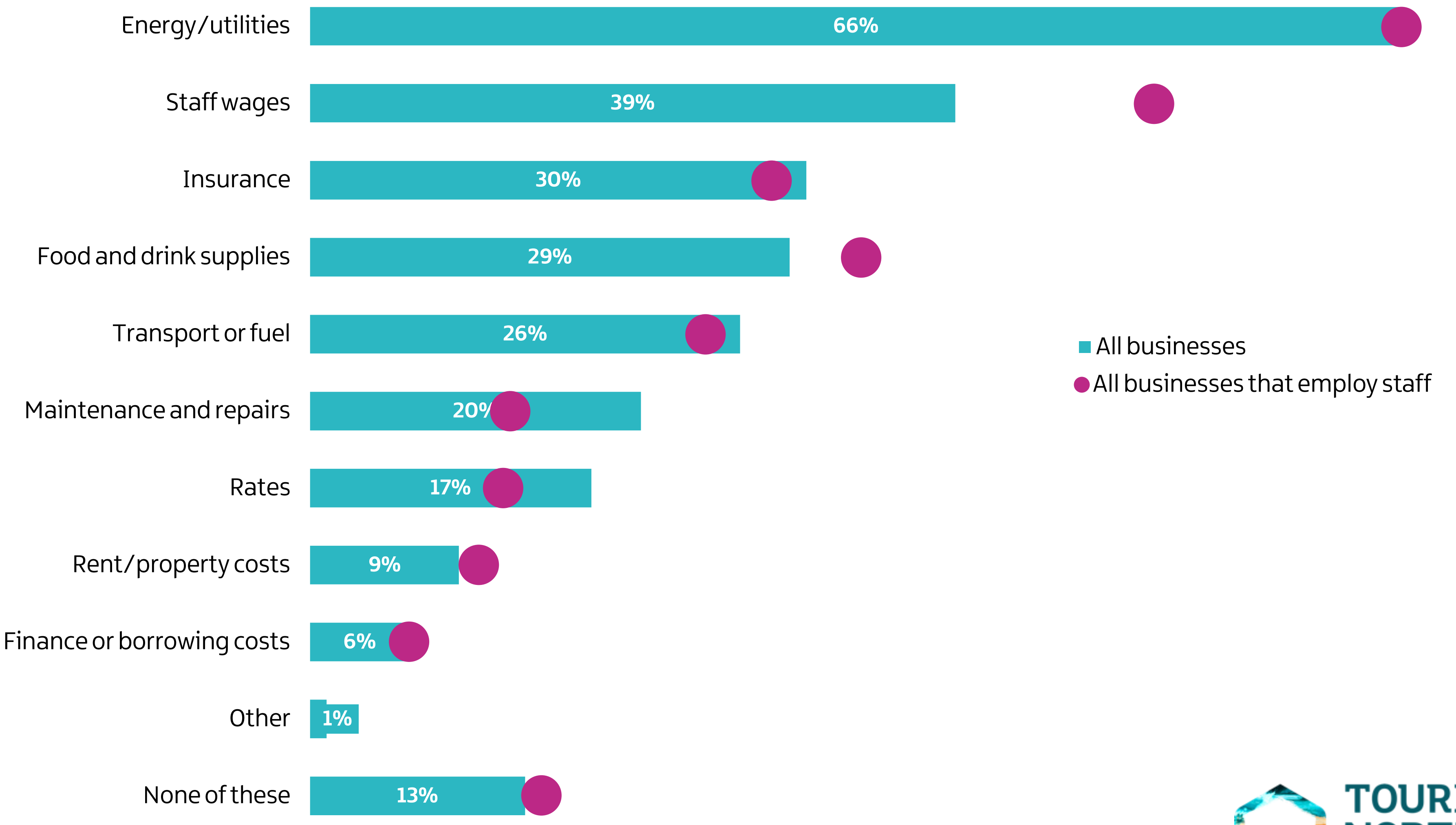
Q. How confident do you feel about running a tourism business profitably for the remainder of the year?

Base: all businesses (n=418); PSA (n=76); self-catering (n=49); attraction (n=67); activity/experience provider (n=93); other (n=133) PSA = paid serviced accommodation includes hotels, B&Bs, guest houses and guest accommodation. *Caution: small base size.*

TOURISM NORTHERN IRELAND

Significant increases in operating costs

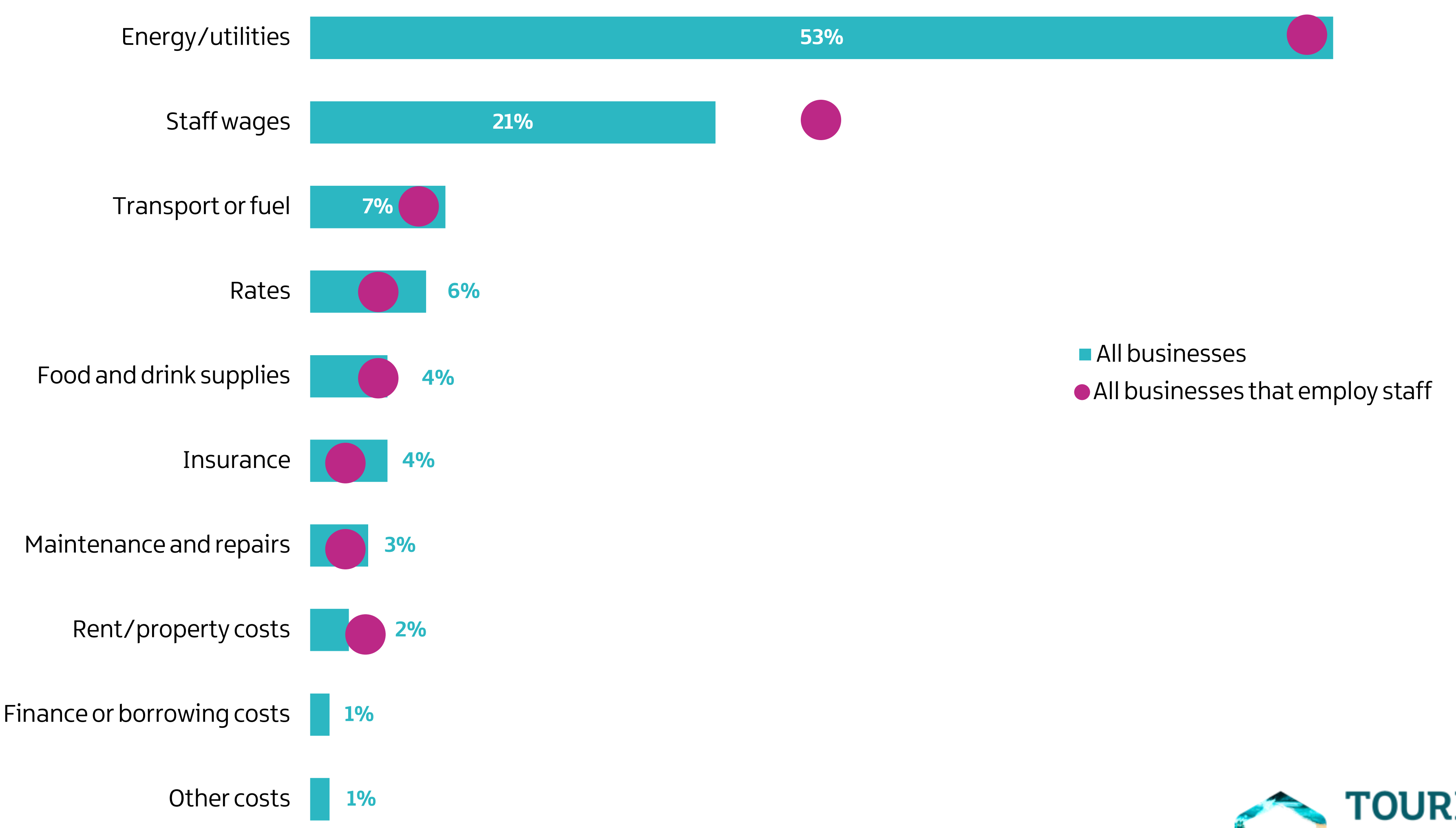
Significant increases in operating costs



Q. Are there any particular causes for concern regarding business this year?

Base: all businesses (n=418); all businesses that employ staff (n=306).

Significant increases in operating costs – ranked first for most negative impact on business



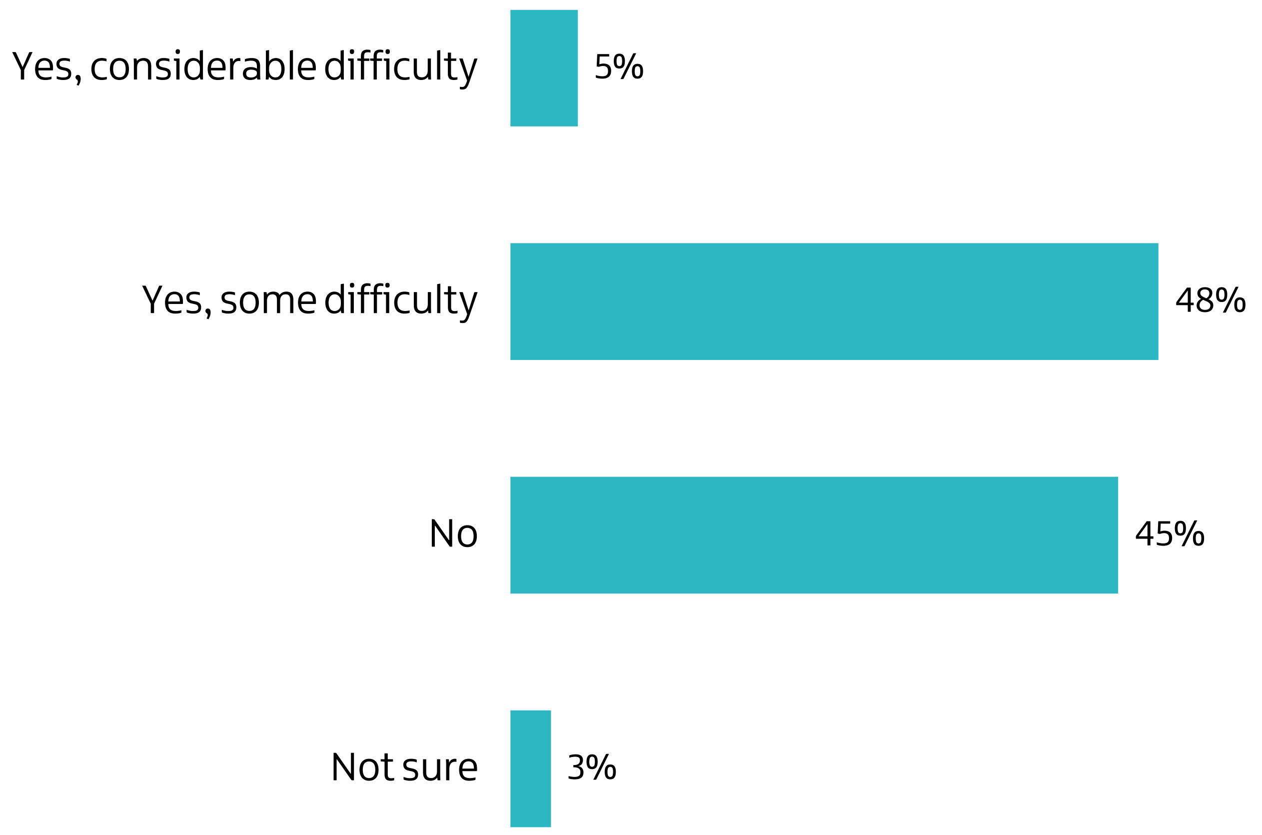
TOURISM NORTHERN IRELAND

Q. Please rank the top three operating cost increases that have impacted most negatively on your business.

Base: all businesses with significant increases in operating costs (n=363); all businesses with significant increases in operating costs that employ staff (n=264).

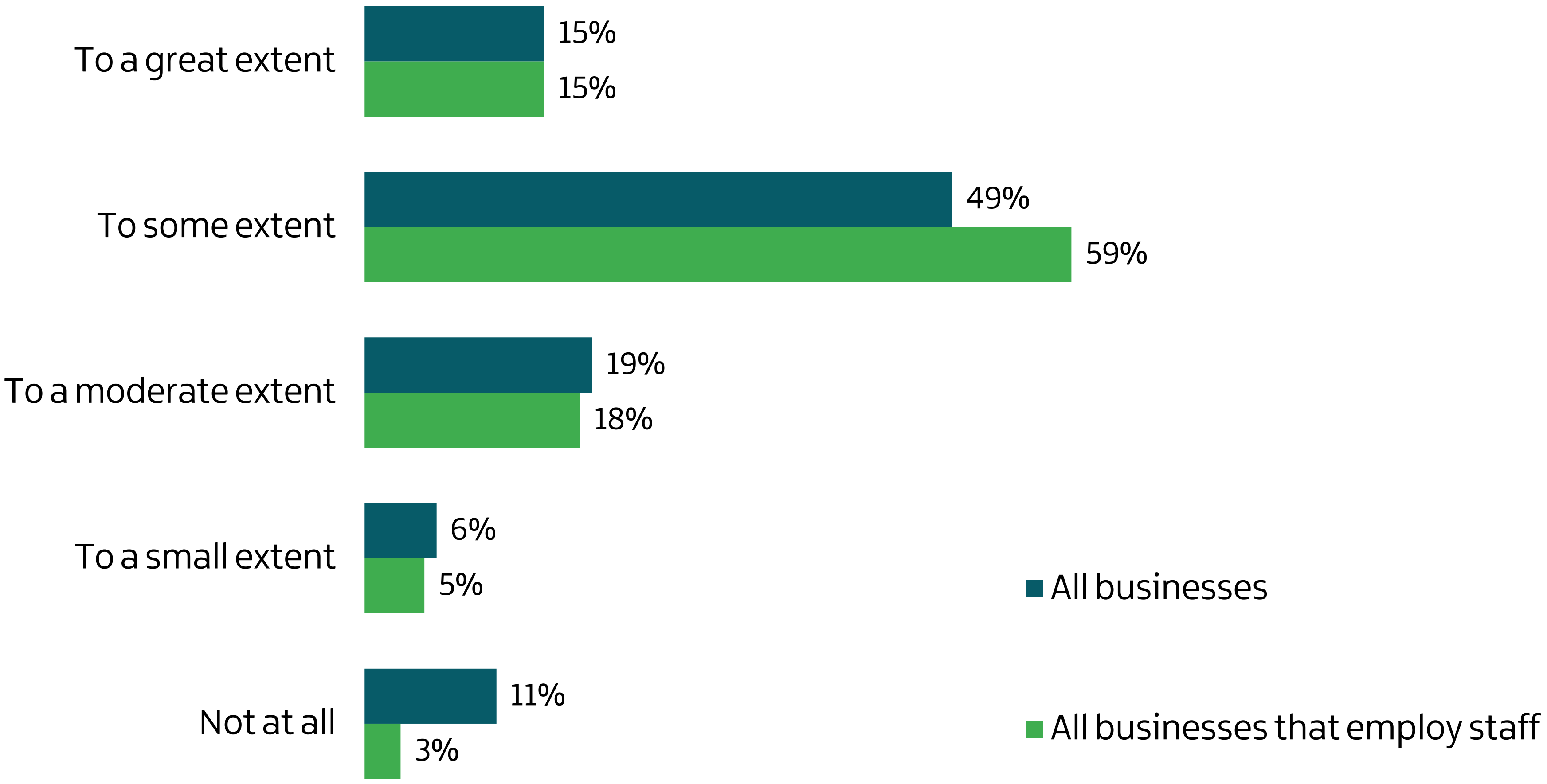
Staffing

Experiencing difficulties recruiting staff required



Q. Are you experiencing any difficulties in recruiting the staff that you need?
Base: all businesses that employ staff (n=306).

Need for increased training and skills development



Q. To what extent do you believe there is a significant need for increased investment in training and skills development for your business sector?

Base: all businesses (n=418); all businesses that employ staff (n=306).