Tourism NI Industry Survey

November 2025

Cognisense
INSIGHTS THAT INCITE

TOURISM NORTHERN IRELAND

Research objectives, methodology and response by sector

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-September 2025).
    - Assess expectations for October-December 2025.
    - Determine causes for concern regarding business this year and next.
    - Help inform the development of future industry support.

Methodology

- Cognisense Ltd. conducted the survey and data analysis.

- A total of 414 businesses participated:

  151 online

  263 via telephone

- The fieldwork was administered in October 2025.

- 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	174 (42%)
Activity/experience provider	118 (29%)
Attraction	52 (13%)
Golf club	35 (8%)
Tour operator	8 (2%)
Carrier/transport provider	6 (1%)
Food and drink	3 (1%)
Bar/restaurant/café	2 (<1%)
Conference venue	2 (<1%)
Event organiser	2 (<1%)
Other	12 (3%)
Total	**414**

Accommodation businesses make up 42% of the survey sample, with activity/experience providers representing 29% and attractions a further 13%.

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Q. What type of business do you run?
Base: all businesses (n=414).

Key findings

Overview

Overall, positive visitor volumes were reported for the closer to home and international markets during the first nine months of 2025, although around two in ten businesses reported a decline across these markets.

Industry outlook is mixed for the last quarter of the year, with significant levels of concern remaining around key issues, including reduced disposable incomes, high energy prices and other operating costs.

Strong visitor volumes overall, with golf highlighted as a contributing factor

- Two in five (40%) businesses reported higher turnover for January-September 2025 compared to the same period in 2024, with over two-fifths (41%) indicating unchanged levels, and 15% reporting a decrease.

- Just under two in five businesses reported an increase in volume from the domestic (37%) and US (36%) markets. Increases of between 25%-30% were highlighted for the Republic of Ireland, GB, mainland Europe and Rest of World markets. For each market, golf was amongst the factors highlighted as contributing to higher volumes.

- Amongst those businesses that reported a decrease in volume from the closer to home markets, cost of living/reduced disposable income was the contributing factor most likely to be mentioned. For those that reported a decrease from further afield markets, the impact of global uncertainties on international travel, cheaper options from competitors and the expense of travelling to NI were the contributing factors most frequently cited.

Profitability encouraging, with repeat visitors and positive reviews/ recommendations reasons to be optimistic

- Almost two in five (37%) businesses indicated their profitability for January-September 2025 was above the level recorded for 2024, with 41% indicating no change, and 17% noting a decrease in profitability.

- Around one-quarter (26%) of businesses expect their overall business volumes for October-December 2025 to be higher than for the same period in 2024, with 54% anticipating similar volumes, and one-fifth expecting a decrease.

- The vast majority (96%) of businesses cited a reason to be positive for the rest of the year and for 2026, with positive online reviews, repeat visitors and word-of-mouth recommendations key reasons for this optimism.

Confidence from the majority despite challenging operating environment

- While the majority (78%) feel confident about running their business profitably for the rest of the year and in 2026, this was not the case for almost one in five businesses (18%).

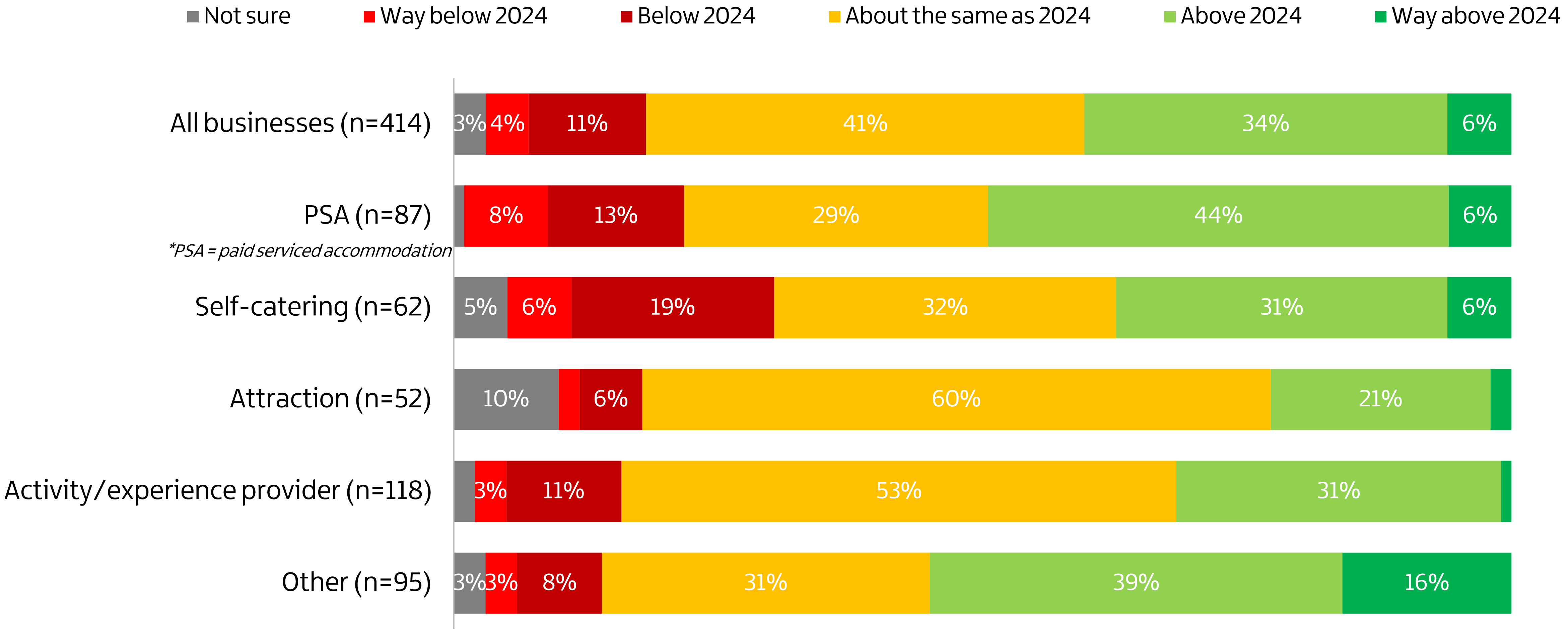
- Over four in five (84%) businesses feel that there are causes for concern regarding business for the remainder of the year and for 2026, with a reduction in people’s disposable income the main concern.

- Around a quarter (26%) of employers reported that they are experiencing difficulties in recruiting the staff that they need, with the cost of staffing also a notable concern for these businesses.

Business performance:

January-September 2025

Turnover January-September 2025 *v* same period in 2024



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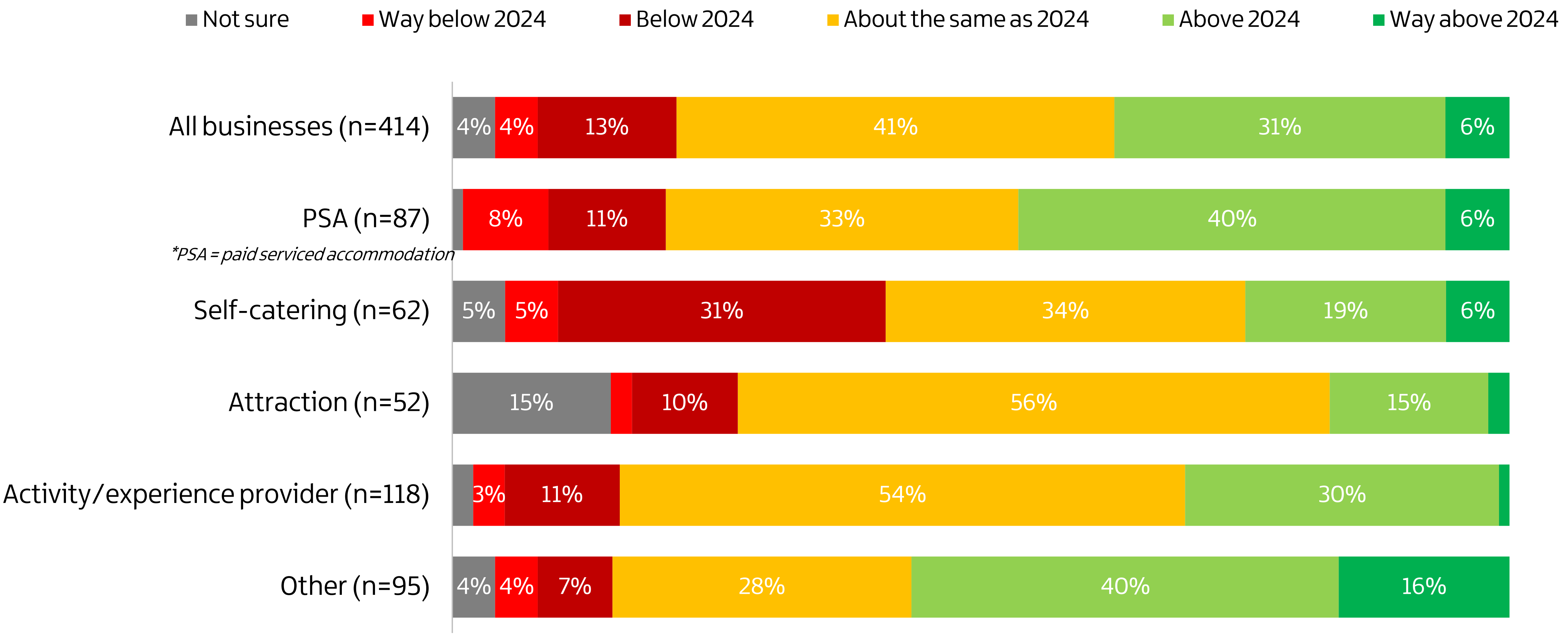
Q. Thinking about January to September 2025, was your business turnover better or worse when compared to the same period in 2024?

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

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

Profitability January-September 2025 *v* same period in 2024



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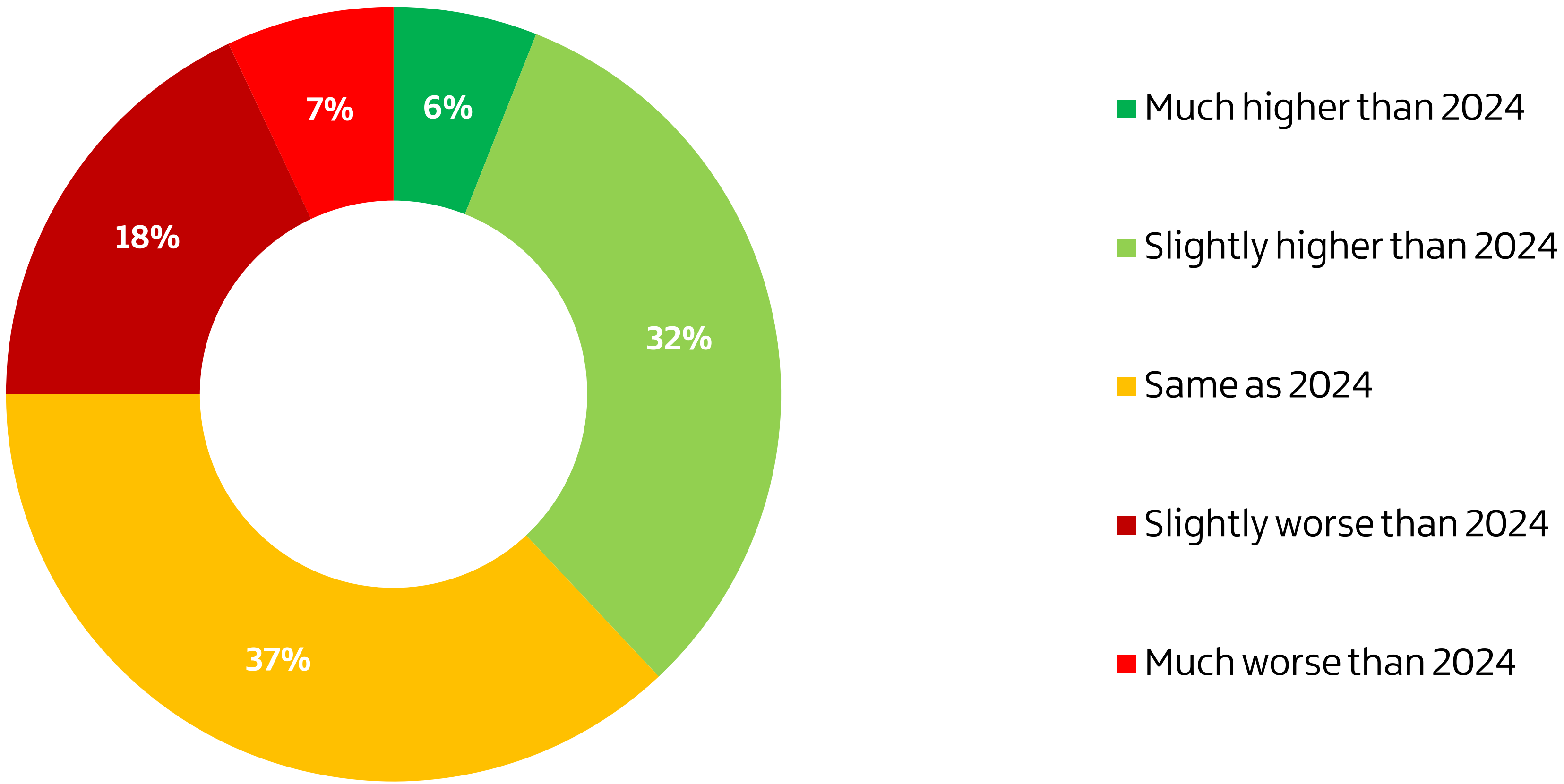
Q. Thinking about January to September 2025, was your business profitability better or worse when compared to the same period in 2024?

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.

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

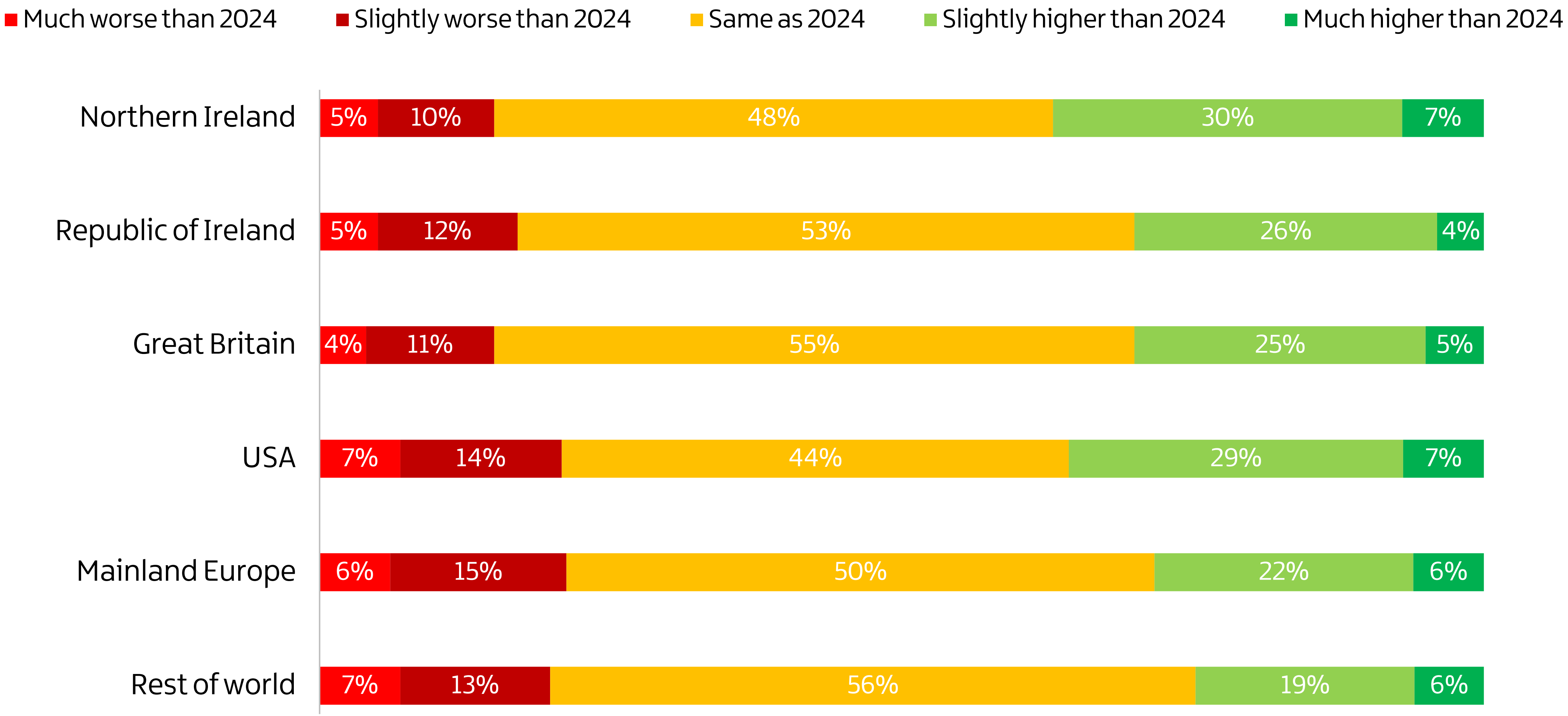


Q. Thinking about January to September 2025, how does your average room yield compare to the same time in 2024?
Base: all accommodation providers (n=174).

Business performance:

January-September 2025 by market

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



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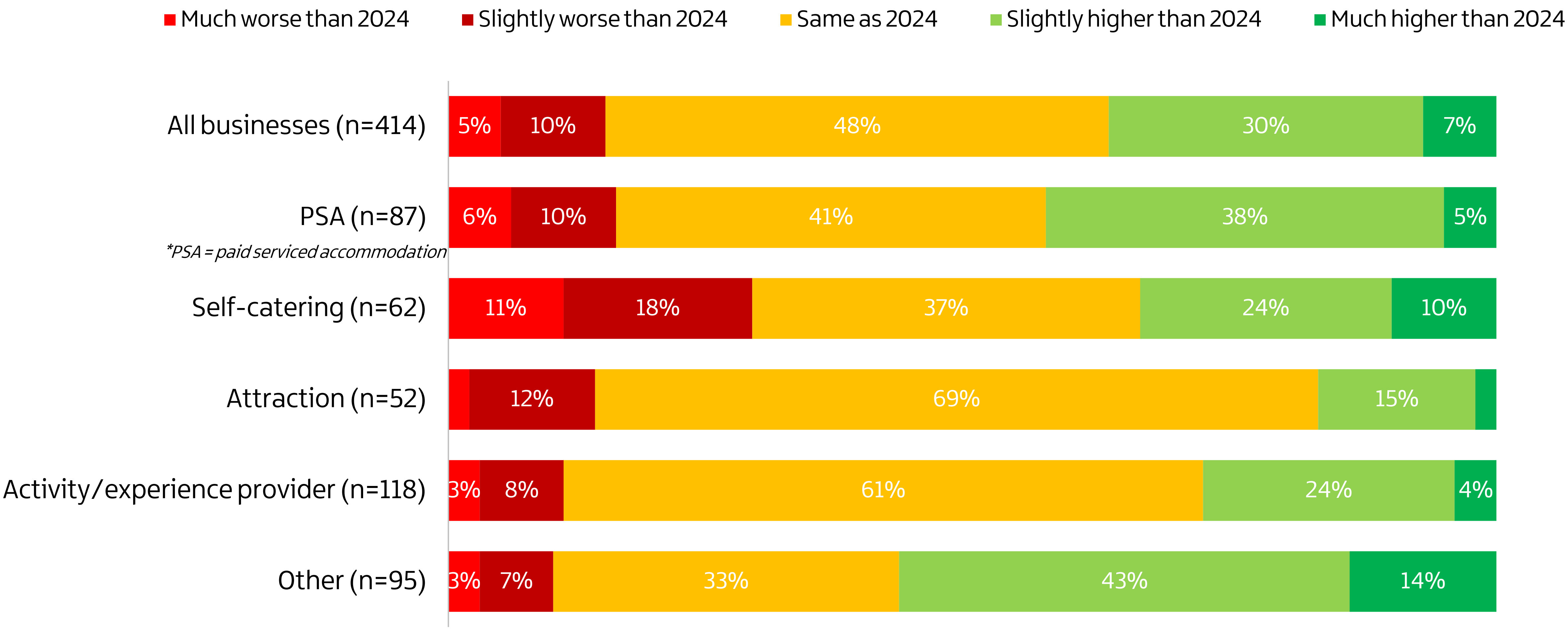
Q. Thinking about January to September 2025, how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses (n=414).*

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



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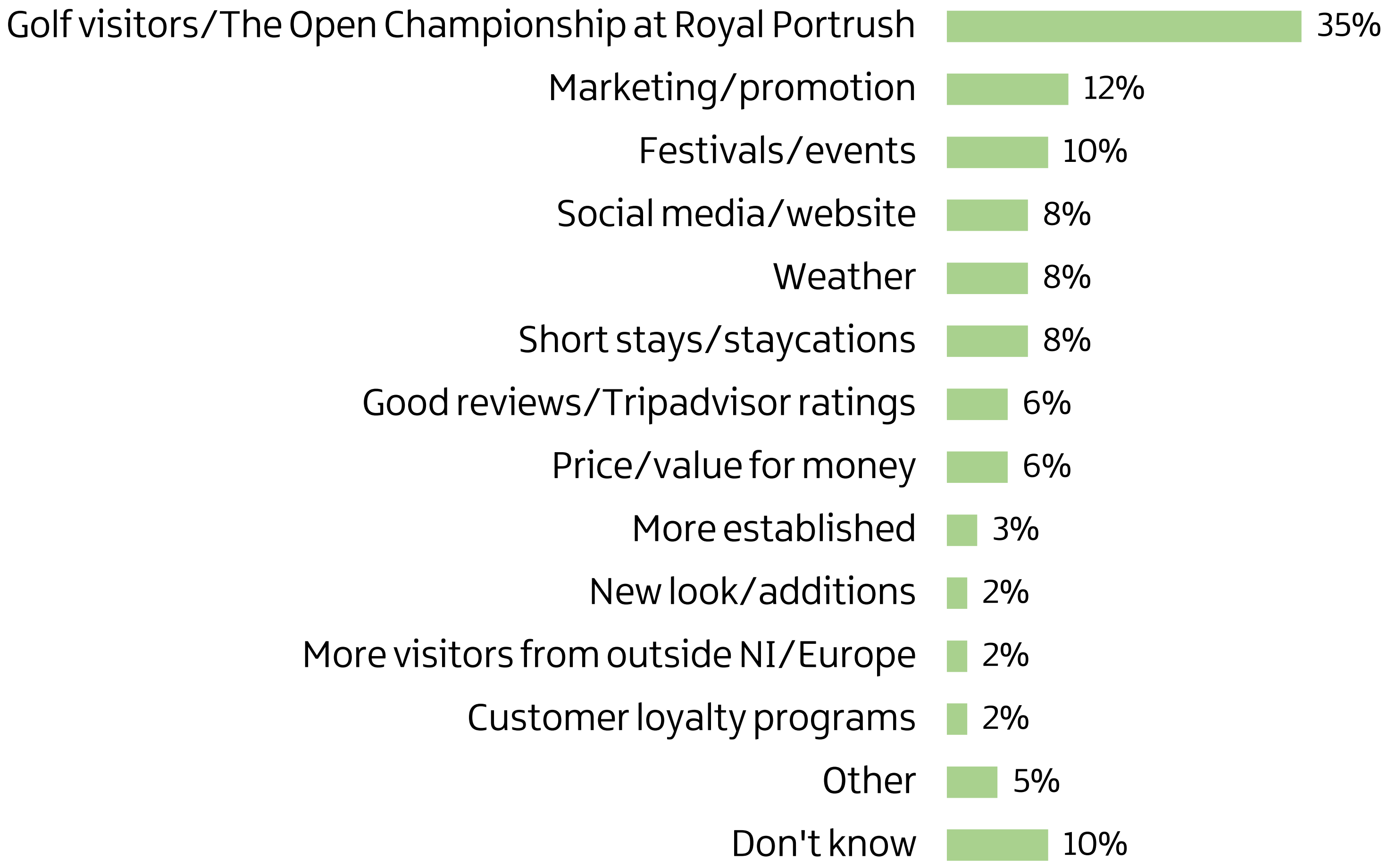
Q. Thinking about January to September 2025, how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label = 2%.*
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

Factors influencing higher NI market performance for January-September 2025 *v* same period in 2024



Q. Are there any factors that are likely to have contributed to the higher volume of business from the NI market?
Base: all businesses with higher NI market performance for January to September 2025 compared to the previous year (n=154).

Factors influencing lower NI market performance for January-September 2025 *v* same period in 2024

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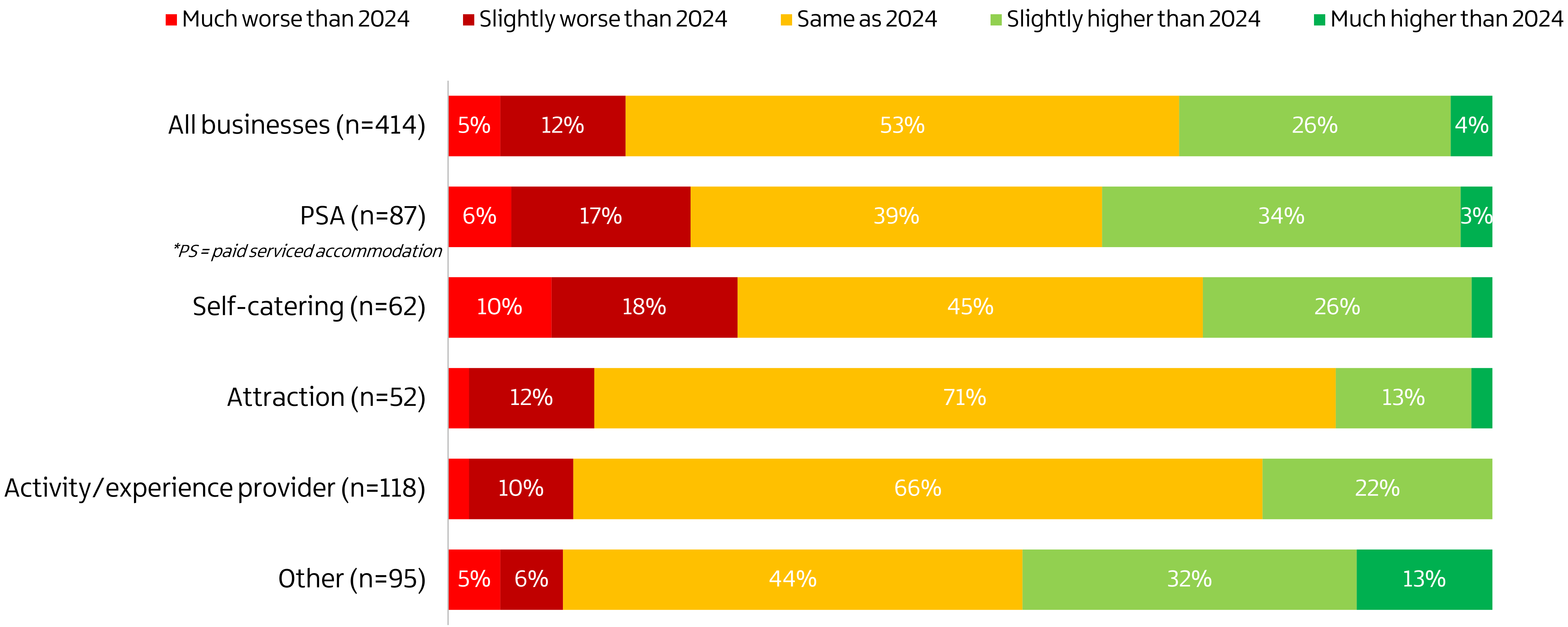
Q. Are there any factors that are likely to have contributed to the lower volume of business from the NI market?

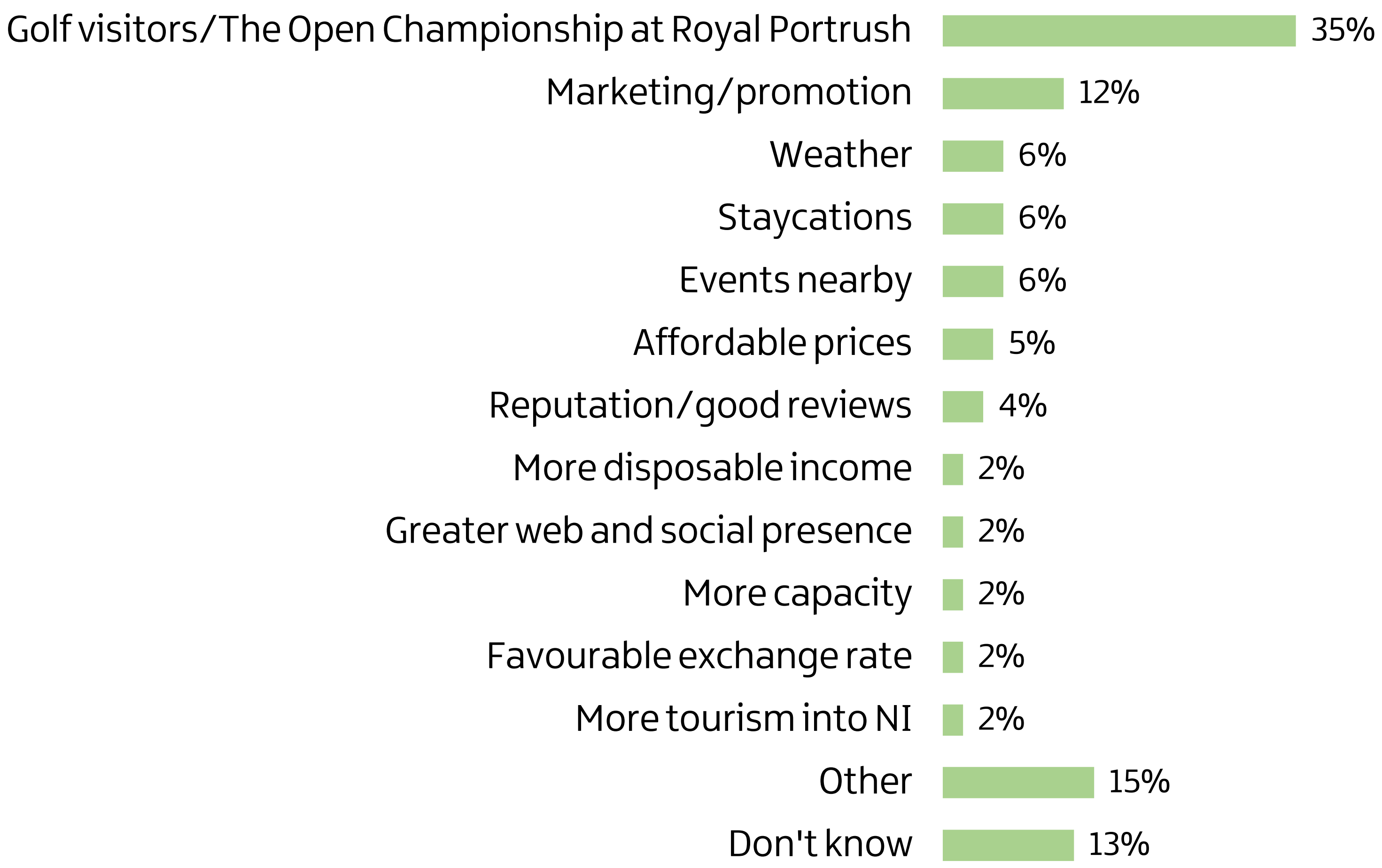
Base: all businesses with lower NI market performance for January to September 2025 compared to the previous year (n=62).

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



Q. Thinking about January to September 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%.*
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

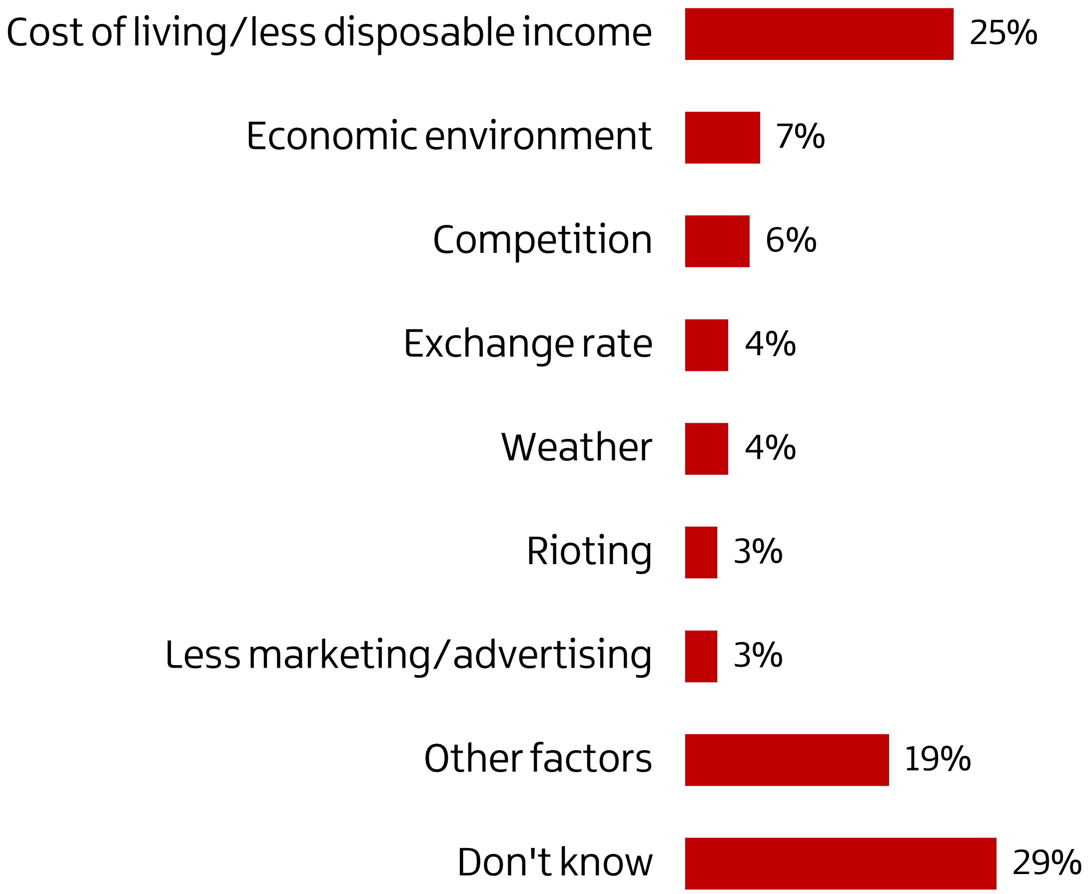
Factors influencing higher ROI market performance for January-September 2025 *v* same period in 2024



Q. Are there any factors that are likely to have contributed to the higher volume of business from the ROI market?

Base: all businesses with higher ROI market performance for January to September 2025 compared to the previous year (n=126).

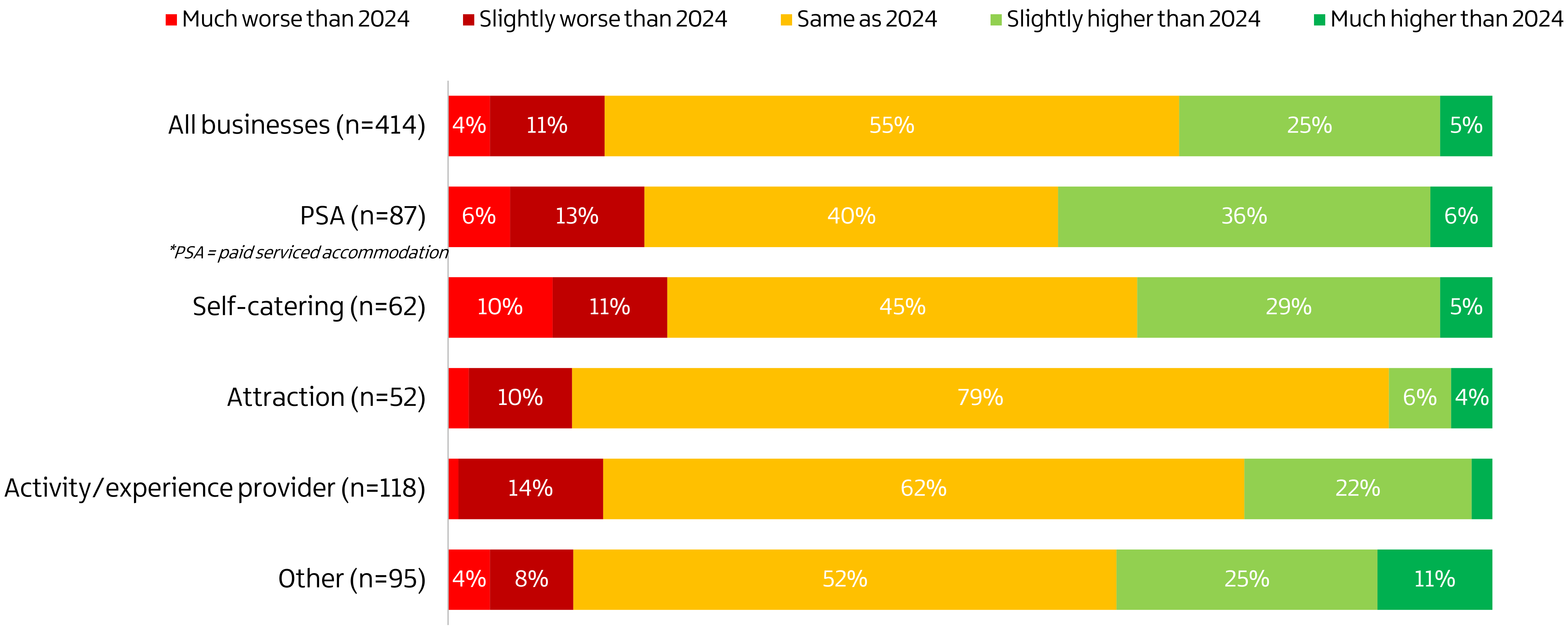
Factors influencing lower **ROI market** performance for January-September 2025 *v* same period in 2024



Q. Are there any factors that are likely to have contributed to the lower volume of business from the ROI market?

Base: all businesses with lower ROI market performance for January to September 2025 compared to the previous year (n=69).

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



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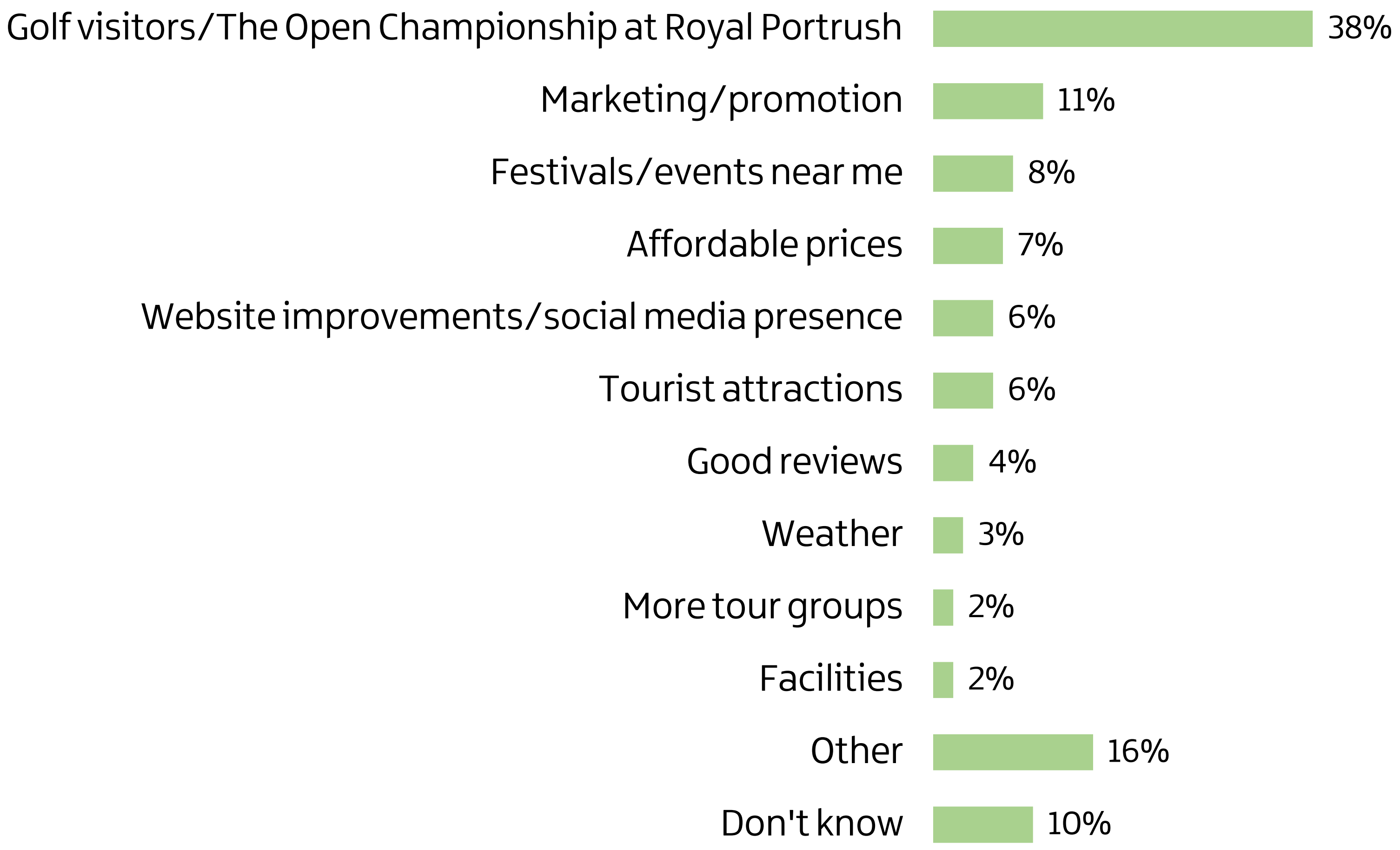
Q. Thinking about January to September 2025, how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. Note: each chart segment without a data label ≤ 2%.*
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

Factors influencing higher GB market performance for January-September 2025 *v* same period in 2024



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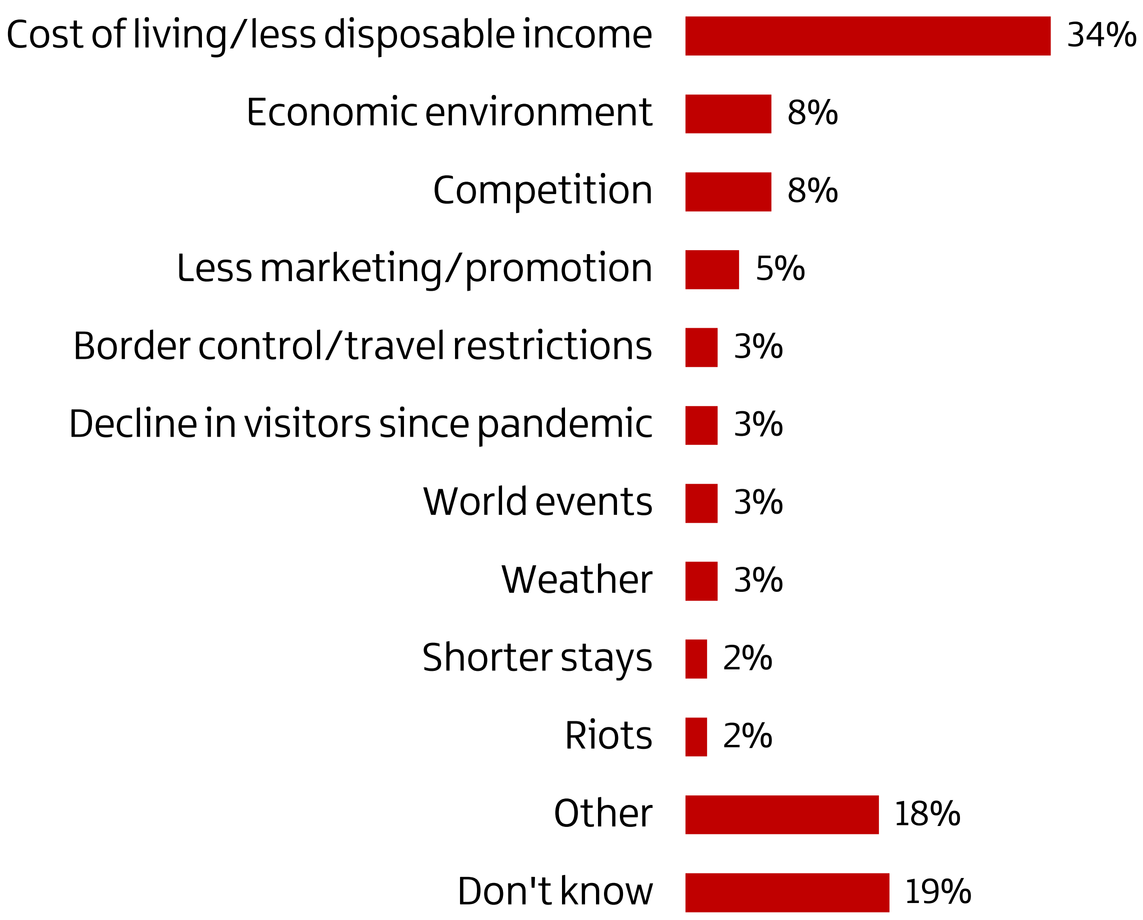
Q. Are there any factors that are likely to have contributed to the higher volume of business from the GB market?

Base: all businesses with higher GB market performance for January to September 2025 compared to the previous year (n=124).

Factors influencing lower GB market performance for January-September 2025 *v* same period in 2024



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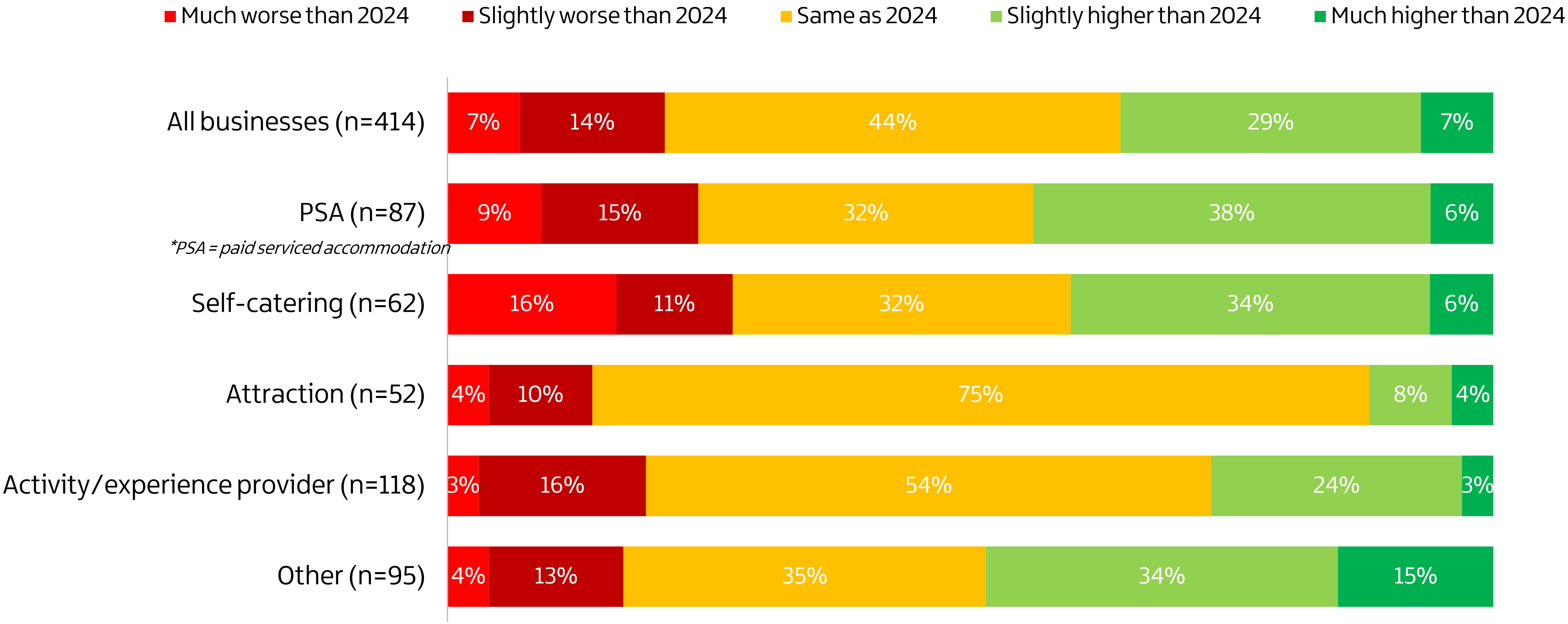
Q. Are there any factors that are likely to have contributed to the lower volume of business from the GB market?

Base: all businesses with lower GB market performance for January to September 2025 compared to the previous year (n=64).

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



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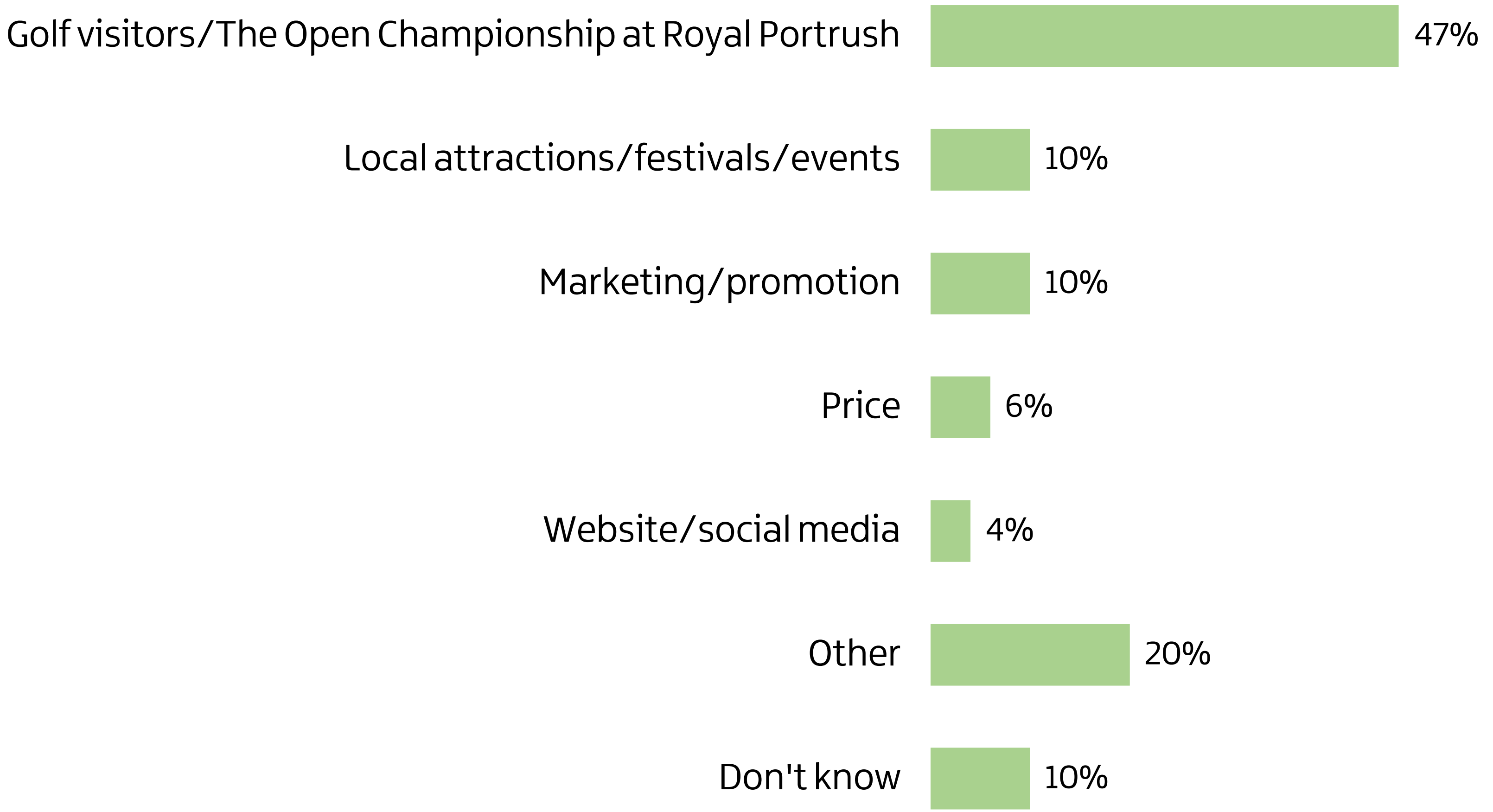
Q. Thinking about January to September 2025, how did the volume of your overall business compare with the same time in 2024 for each of the following markets?
Base: all businesses – sample sizes denoted on chart. PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

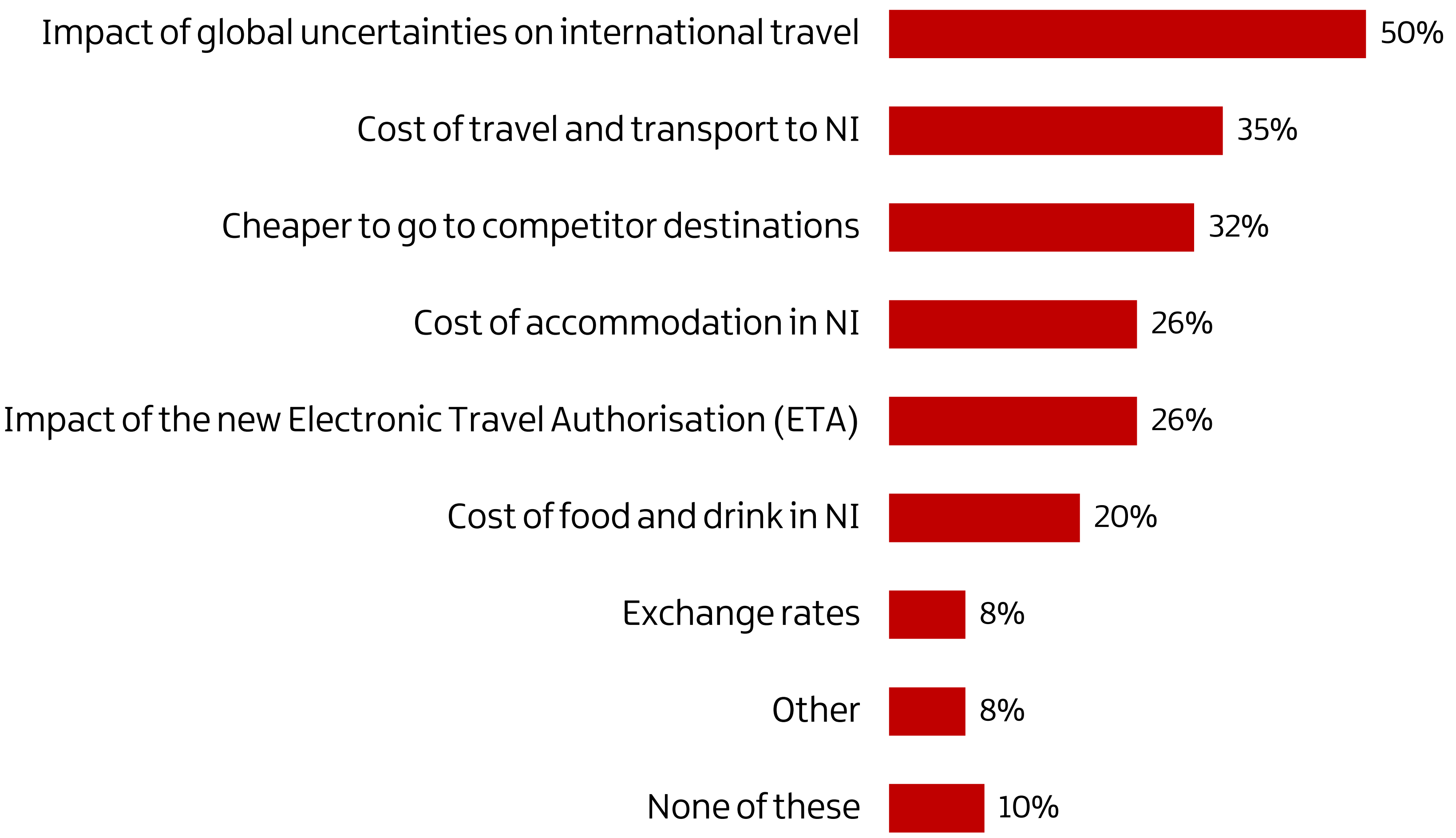
Factors influencing higher **USA market** performance for January-September 2025 *v* same period in 2024



Q. Are there any factors that are likely to have contributed to the higher volume of business from the USA market?

Base: all businesses with higher USA market performance for January to September 2025 compared to the previous year (n=146).

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



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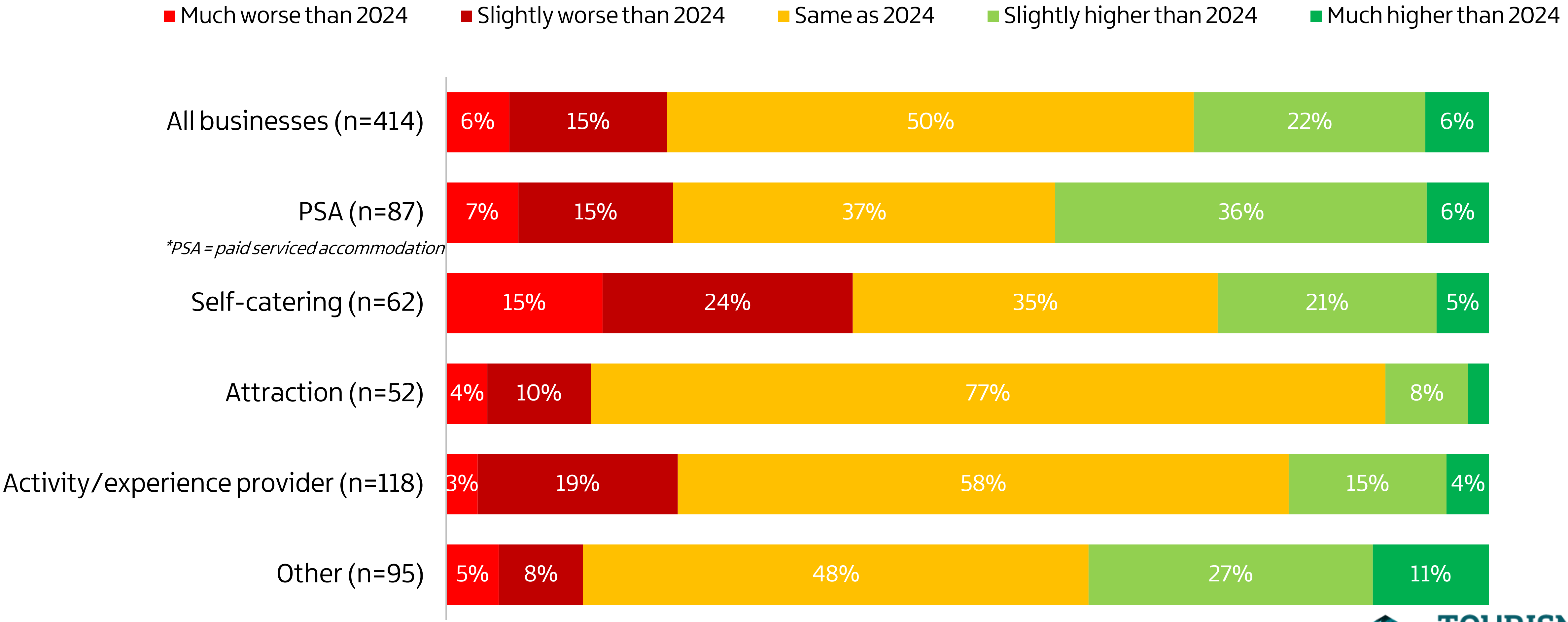
Q. Which, if any, of the following are factors influencing the worse performance for the USA market?

Base: all businesses with worse USA market performance for January to September 2025 compared to the previous year (n=84).

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



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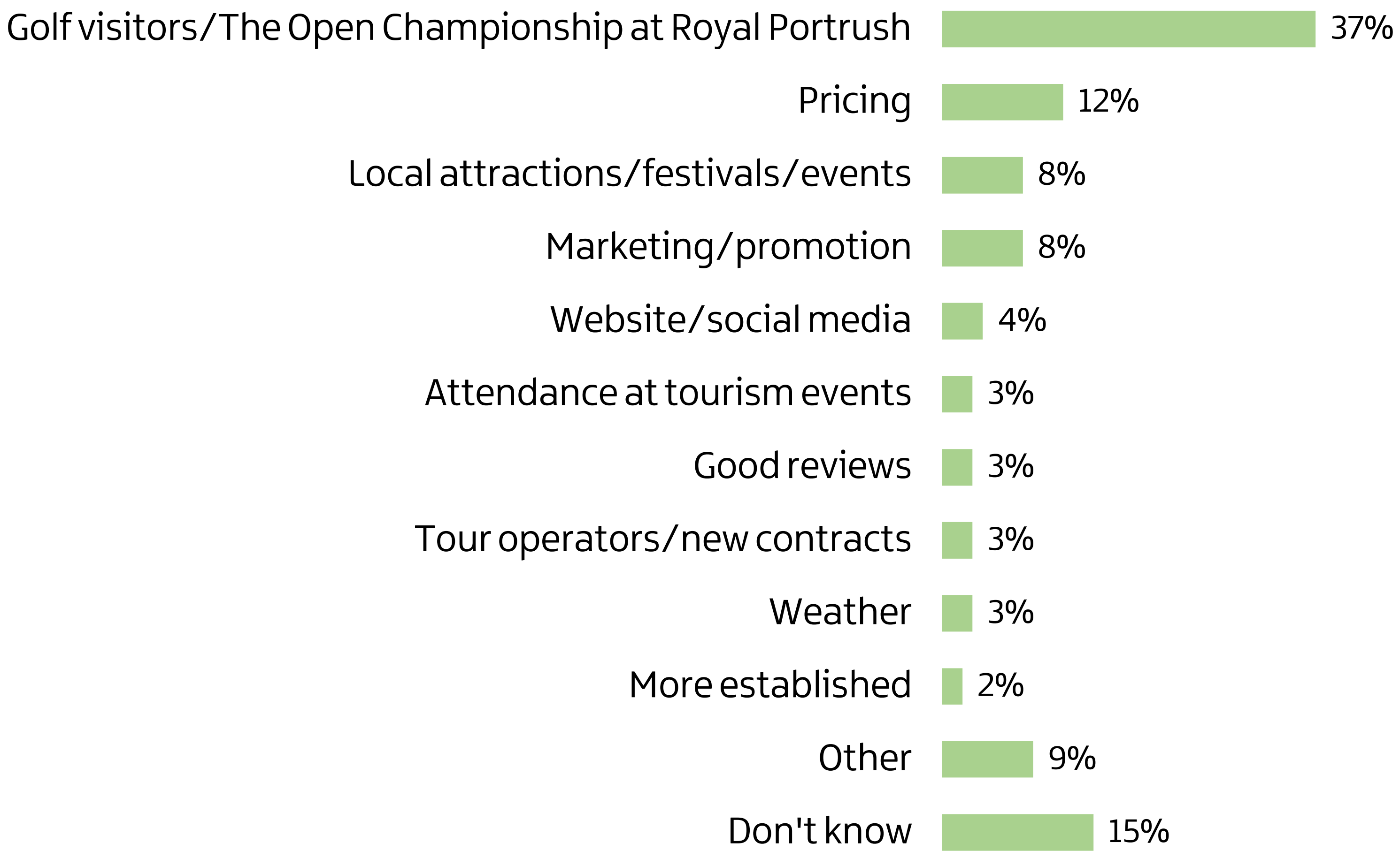
Q. Thinking about January to September 2025, how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. *Caution: small base size. Note: the chart segment without a data label = 2%.*
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

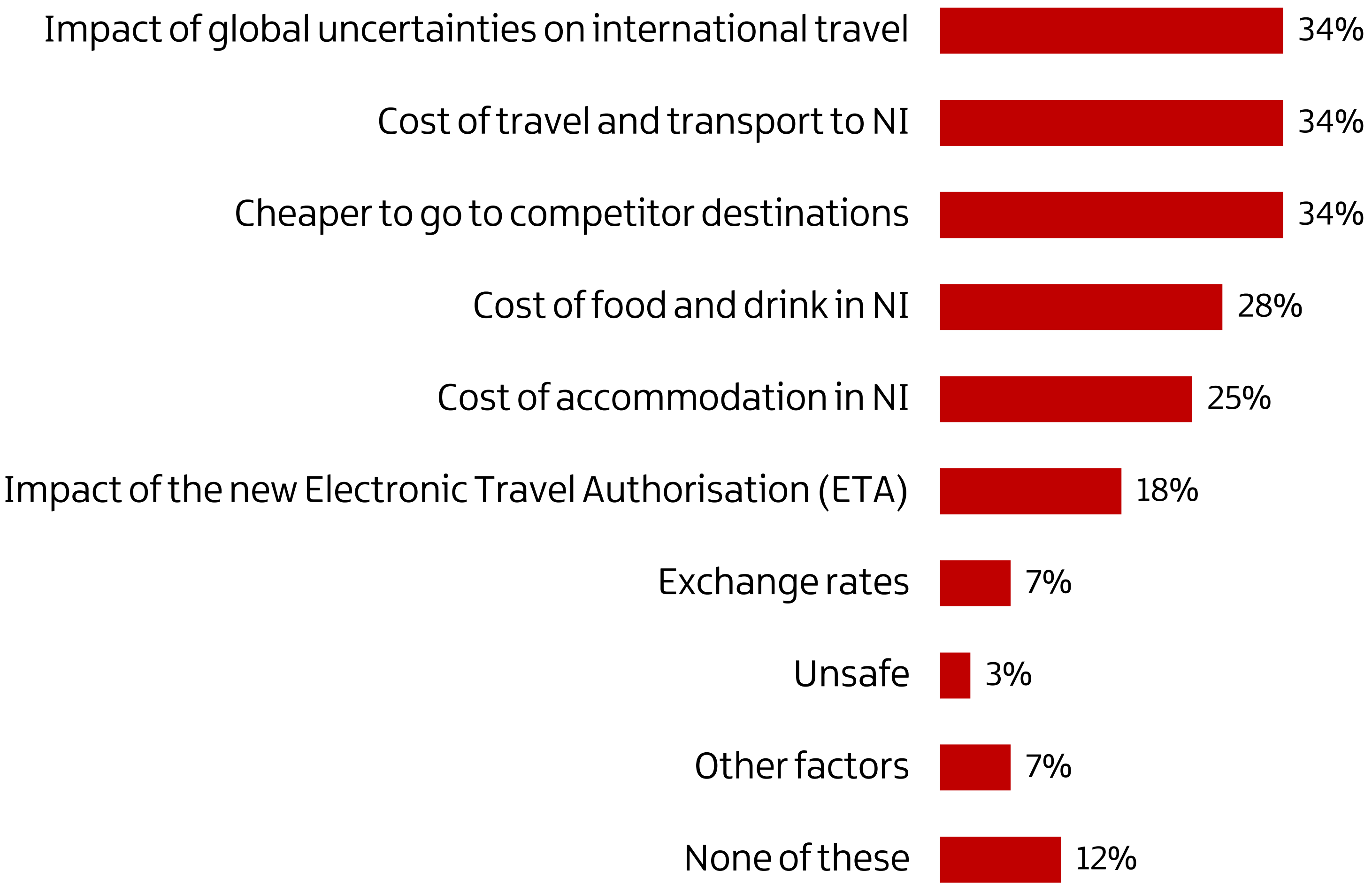
Factors influencing higher mainland Europe market performance for January-September 2025 *v* same period in 2024



Q. Are there any factors that are likely to have contributed to the higher volume of business from the mainland Europe market?

Base: all businesses with higher mainland Europe market performance for January to September 2025 compared to the previous year (n=116).

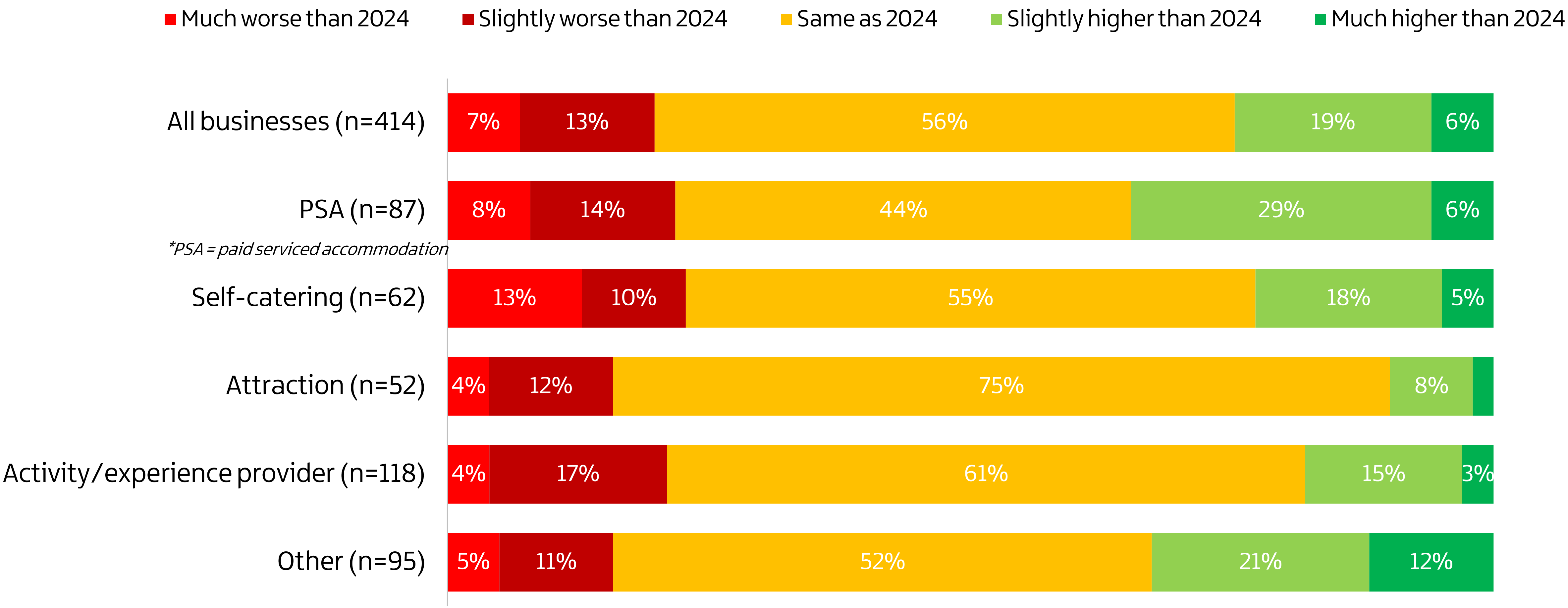
Factors influencing worse mainland Europe market performance for January-September 2025 *v* same period in 2024



Q. Which, if any, of the following are factors influencing the worse performance for the mainland Europe market?

Base: all businesses with worse mainland Europe market performance for January to September 2025 compared to the previous year (n=89).

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



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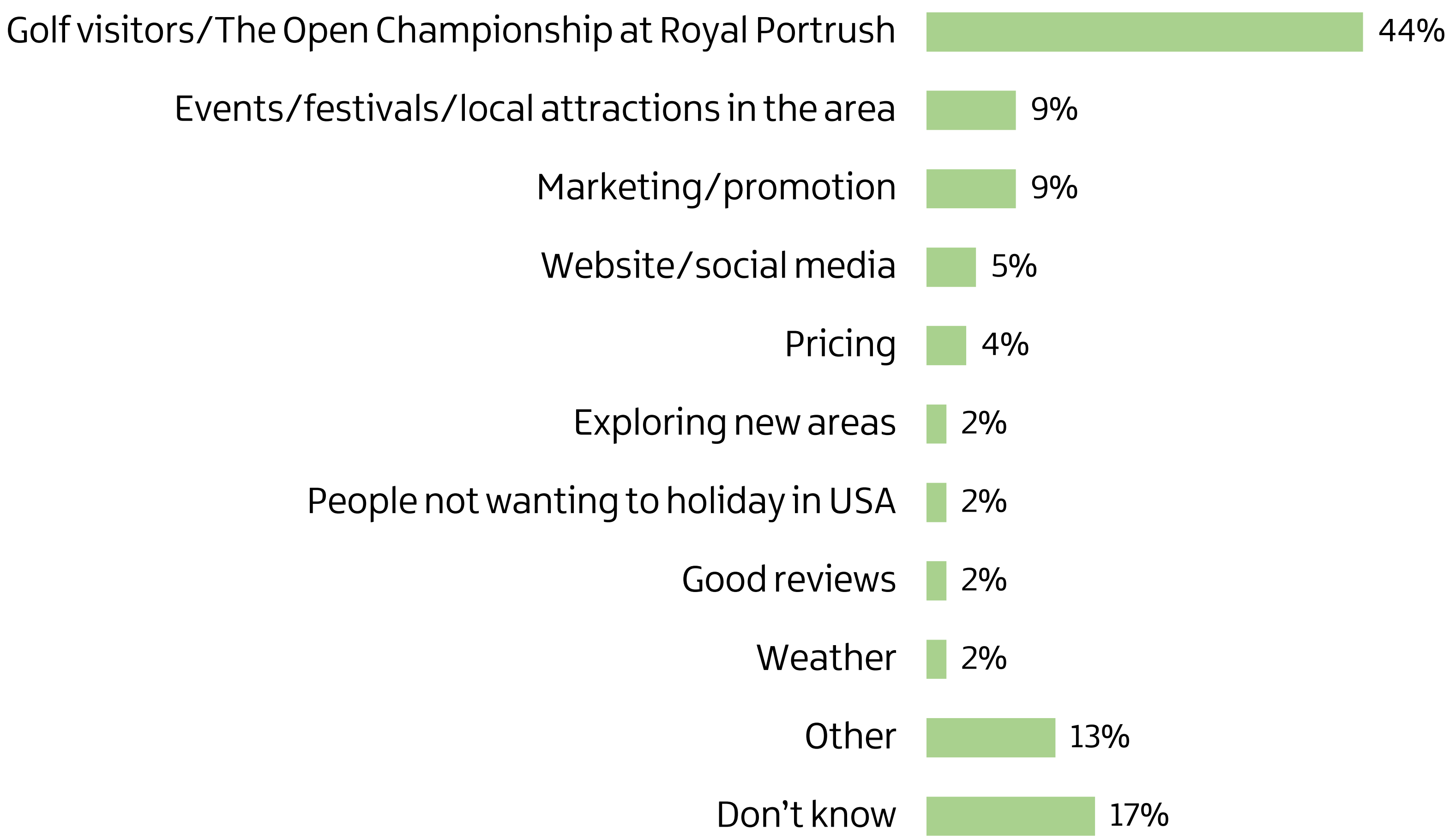
Q. Thinking about January to September 2025, how did the volume of your overall business compare with the same time in 2024 for each of the following markets? *Base: all businesses – sample sizes denoted on chart. *Caution: small base size. Note: the chart segment without a data label = 2%.*
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

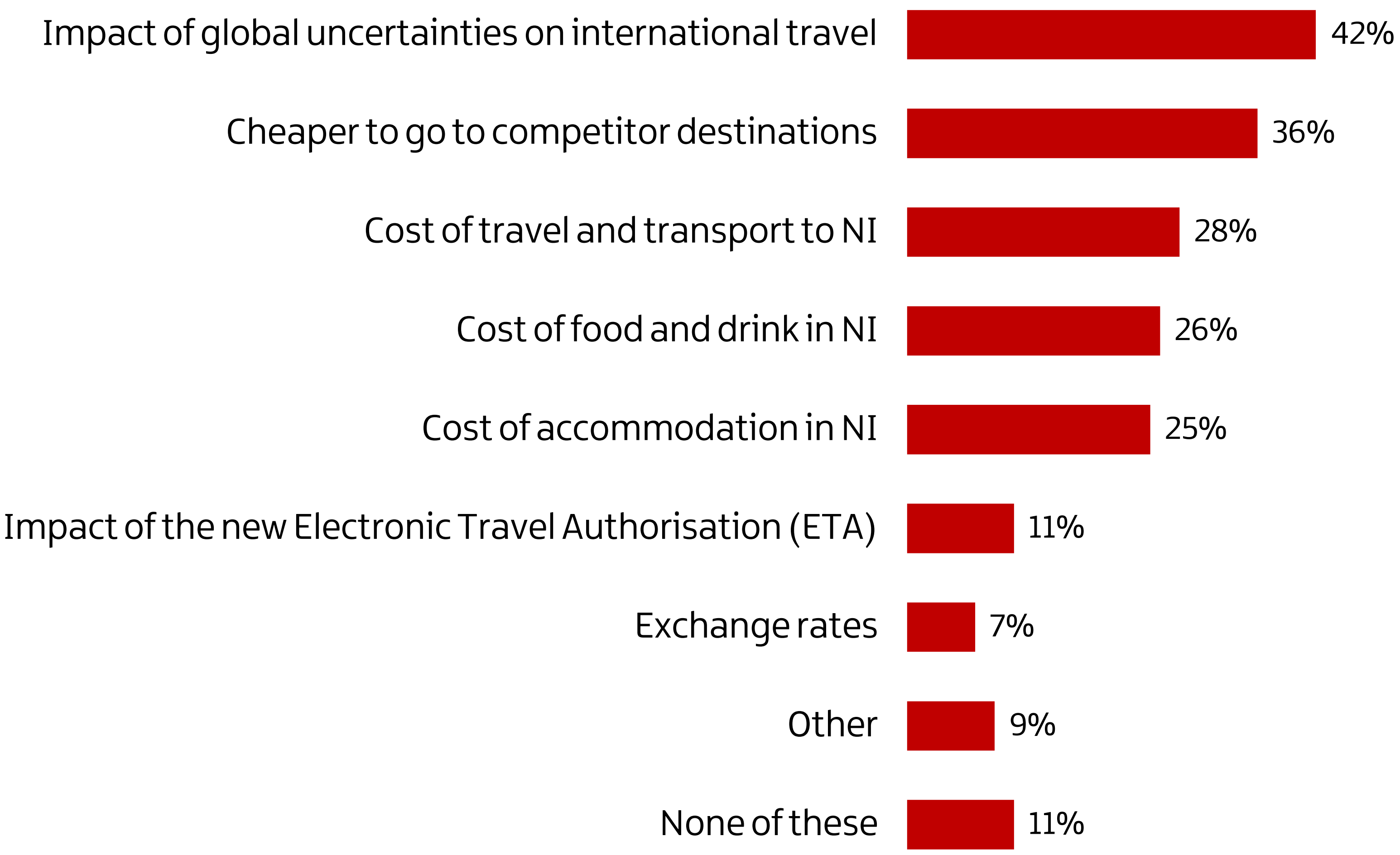
Factors influencing higher rest of world market performance for January-September 2025 *v* same period in 2024



Q. Are there any factors that are likely to have contributed to the HIGHER volume of business from the rest of world market?

Base: all businesses with higher rest of world market performance for January to September 2025 compared to the previous year (n=101).

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

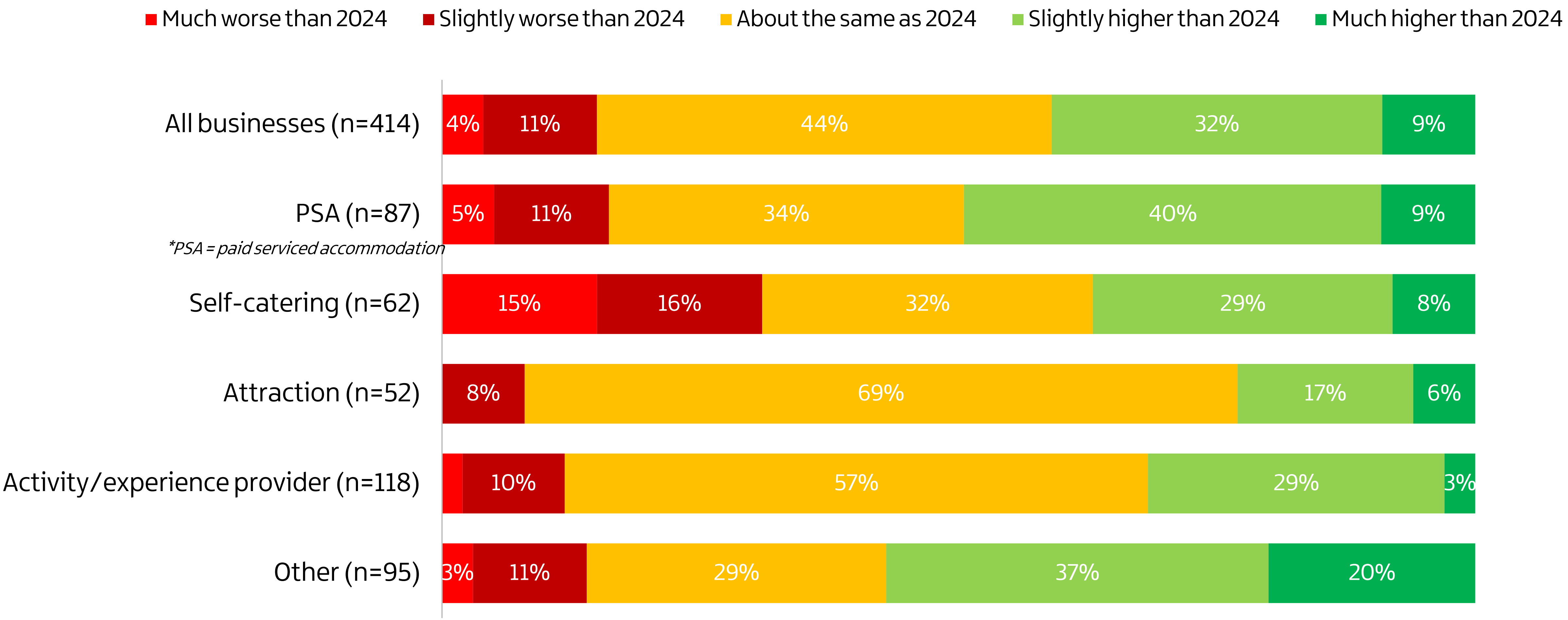


Q. Which, if any, of the following are factors influencing the worse performance for the rest of world market?

Base: all businesses with worse rest of world market performance for January to September 2025 compared to the previous year (n=81).

Business performance: summer season (June–September 2025)

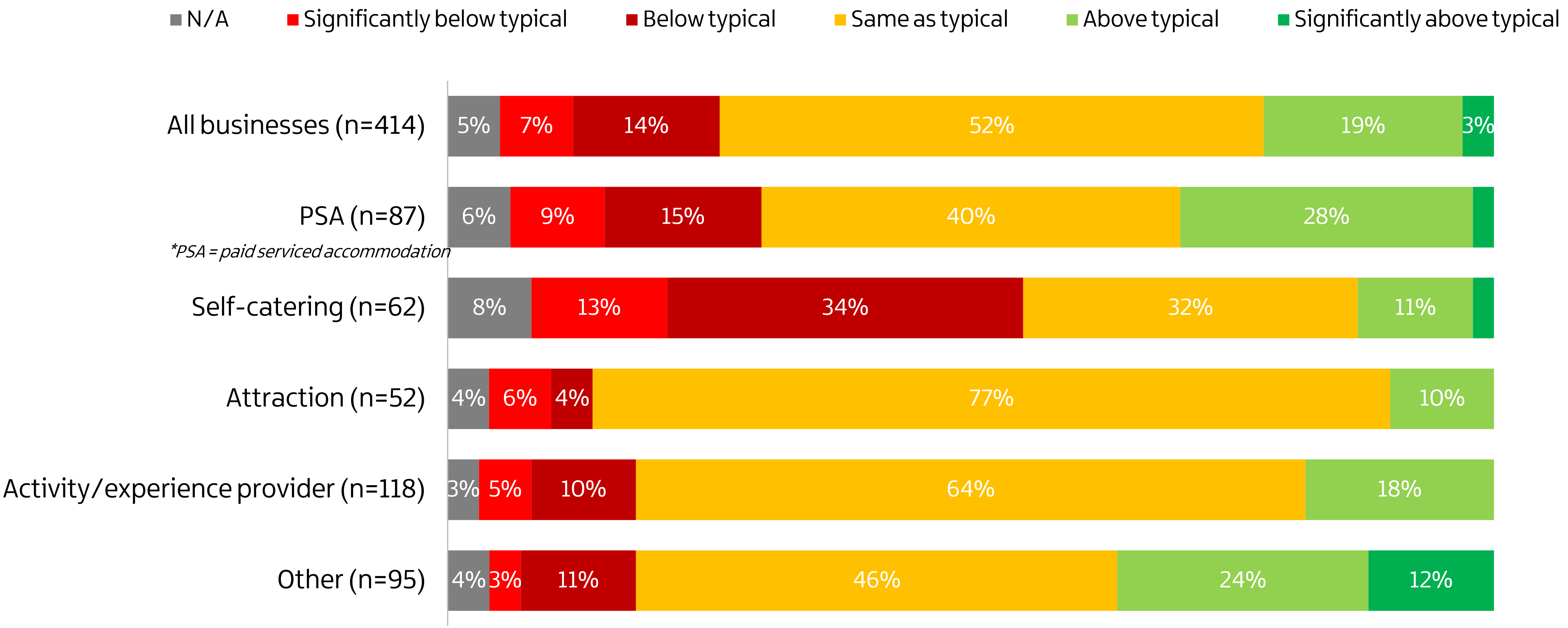
Volume of overall business June-September 2025 *v* same period in 2024



Q. Now that the summer season is over, how do you feel the volume of your overall business for June to September 2025 compared with the same period in 2024? *Base: all businesses – sample sizes denoted on chart. Note: the chart segment without a data label = 2%.*
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

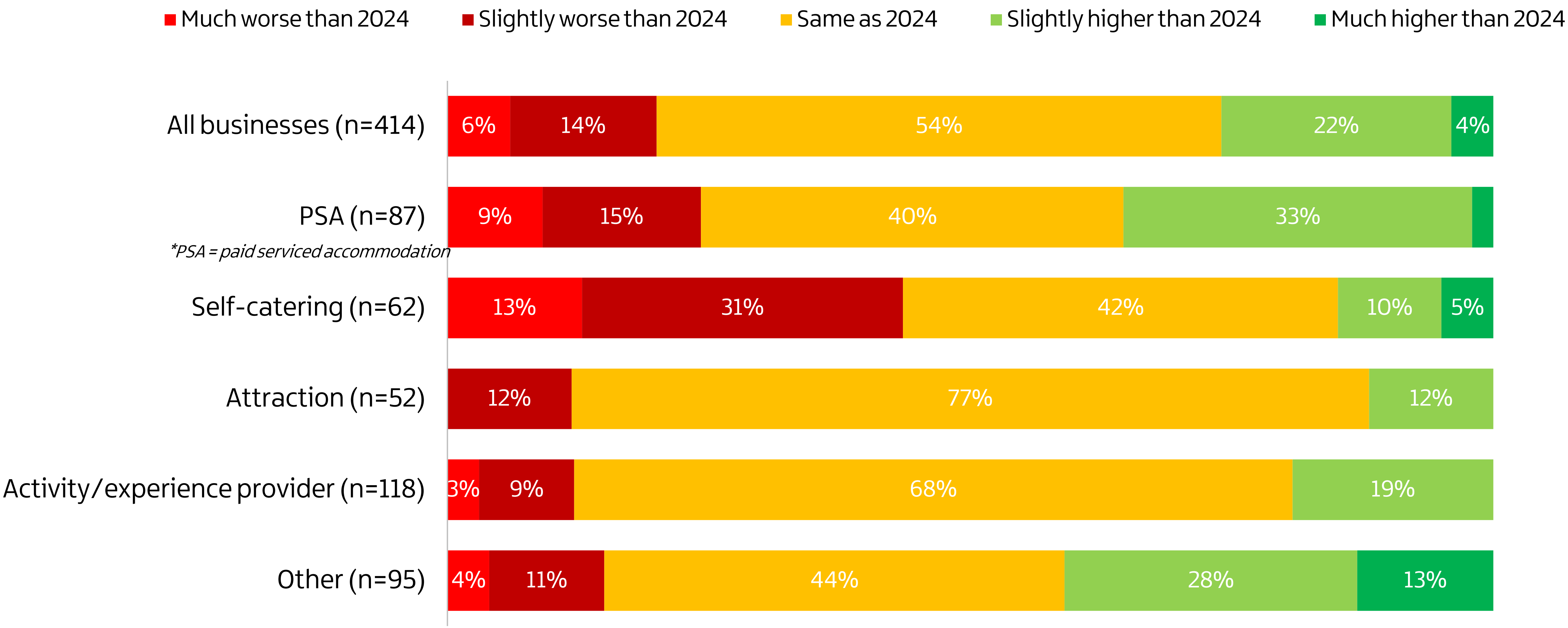
Outlook: October–December 2025

Advance bookings for October-December 2025 compared to normal



Q. How many advance bookings do you have for October to December 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%.*
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

Volume of business expectation for October-December 2025 *v* same period in 2024



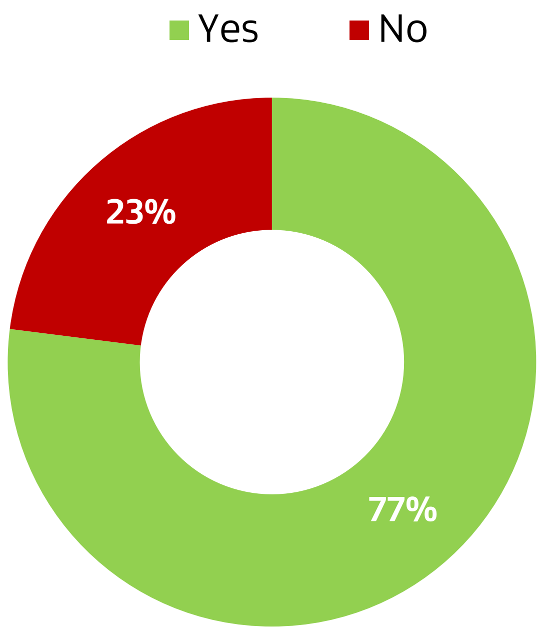
Q. Thinking about October to December 2025, how do you feel the volume of your overall business will compare with the same period in 2024?

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

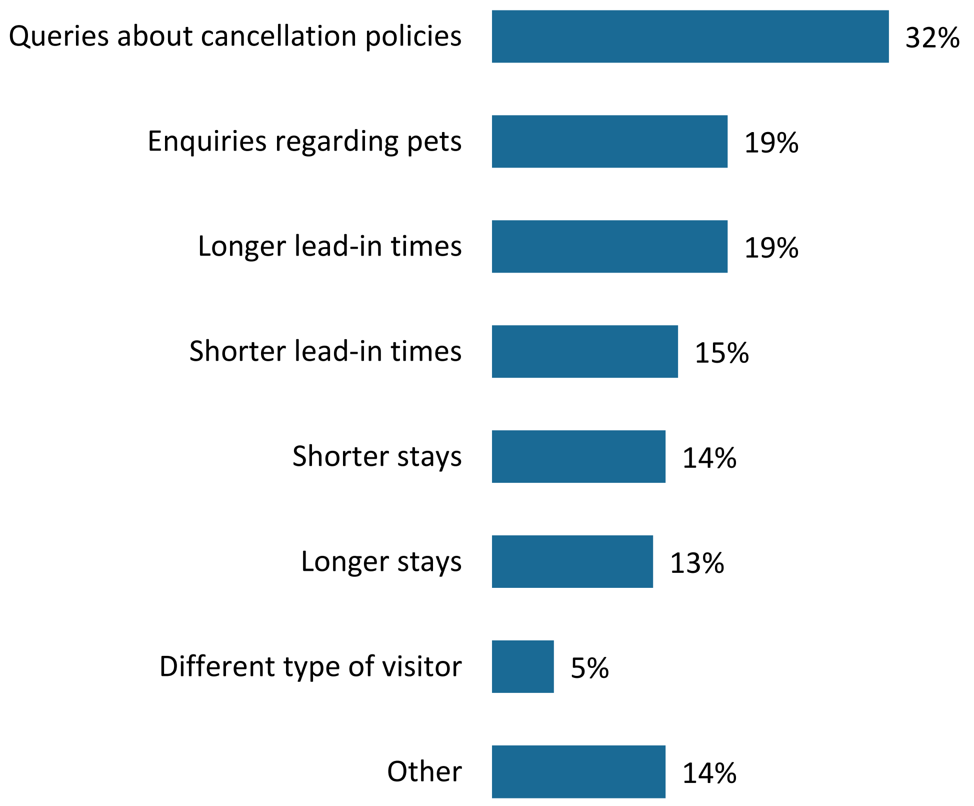
PSA = paid serviced accommodation and includes hotels, B&Bs, guest houses and guest accommodation.

Flexible booking and trends for 2025

Offer flexible booking terms



Booking trends for 2025 that are different from normal



Q. Do you offer flexible booking terms (such as free cancellation, opportunity to move booking)? *Base: all businesses (n=414).*

Q. Are there any booking trends you're noticing for 2025 that are different from normal? *Base: (n=293).*

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Reasons to be positive regarding business for the remainder of the year and for 2026

Reasons to be positive regarding business for the remainder of the year and for 2026

Q. Are there any particular reasons to be positive about business for the remainder of the year and for 2026?
Base: all businesses (n=414).

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

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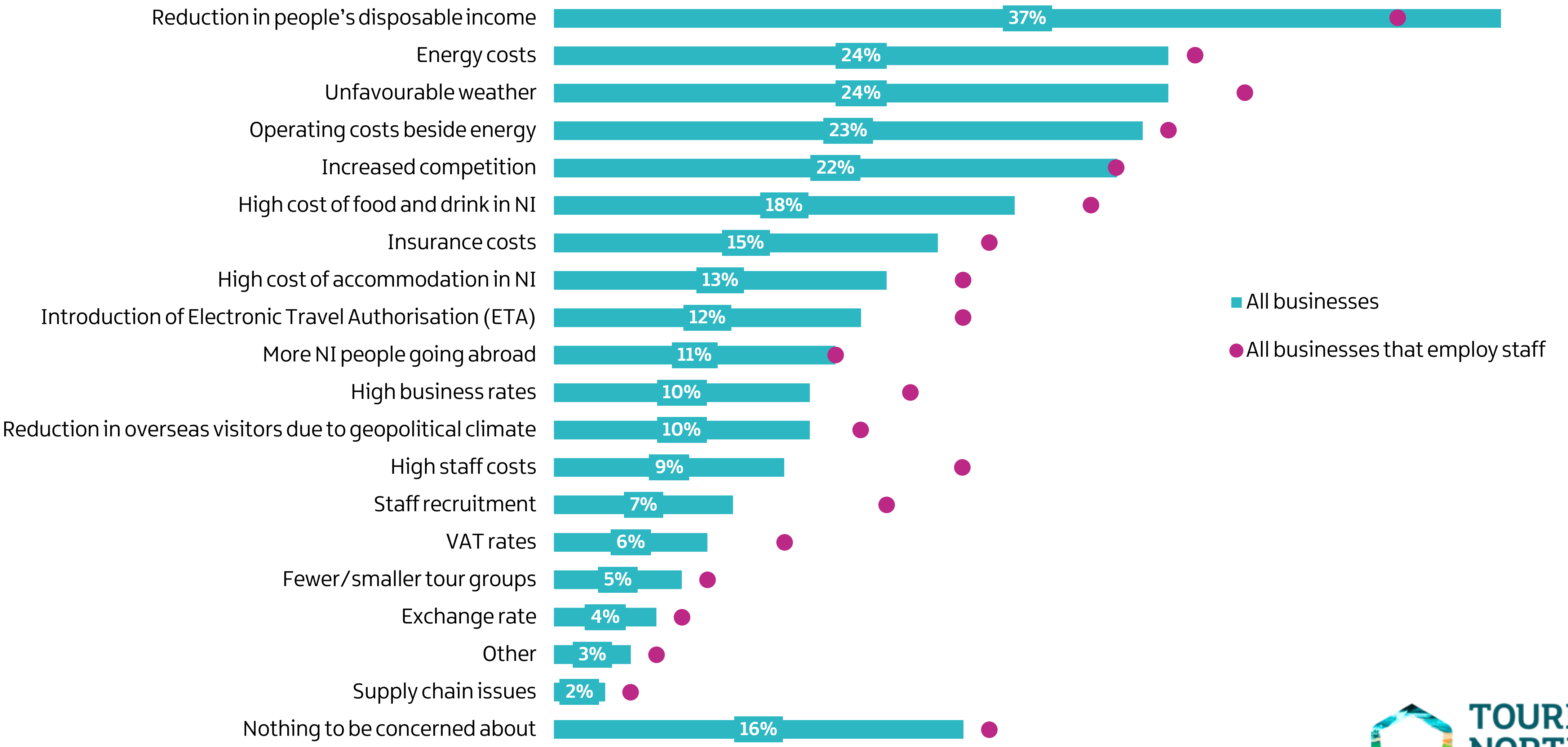

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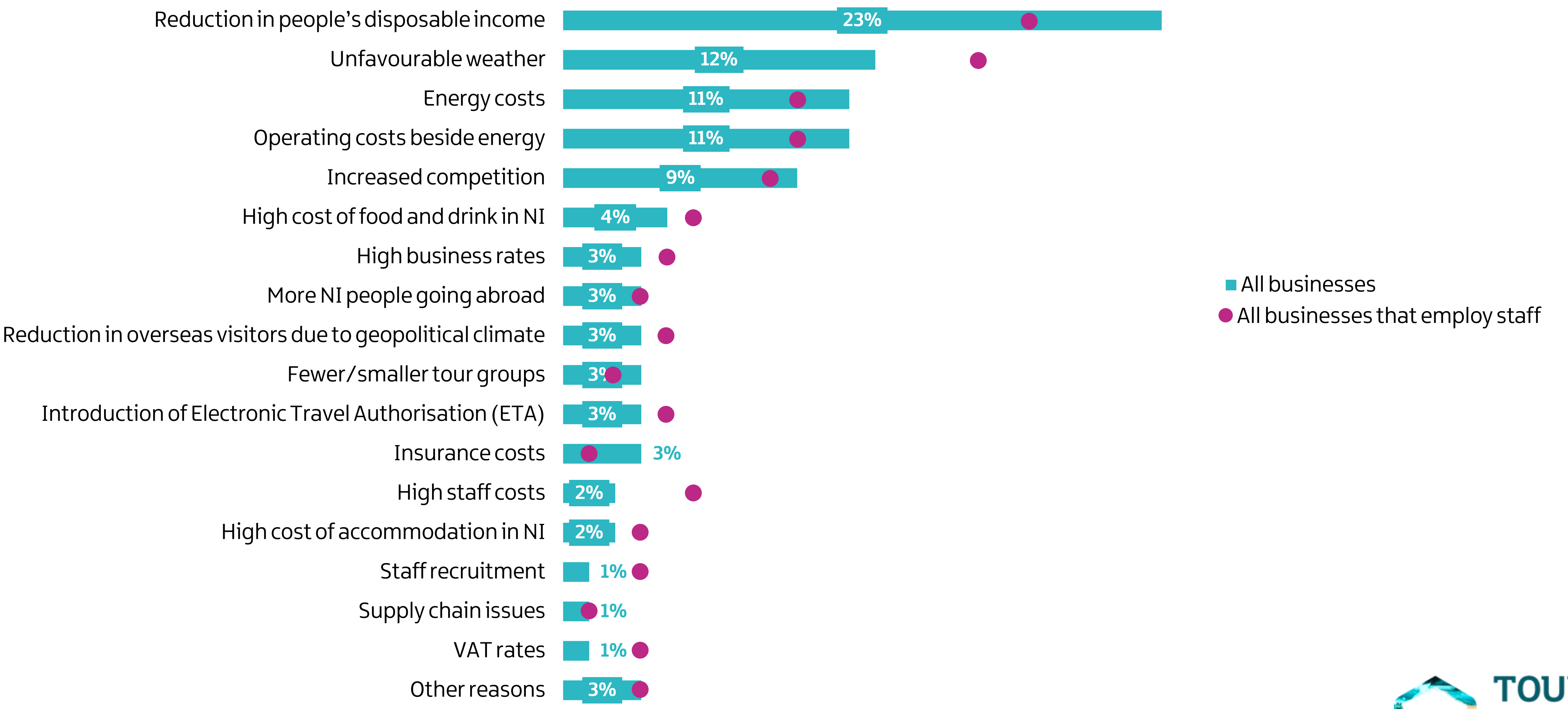
Q. Are there any particular causes for concern regarding business for the remainder of the year and for 2026?

Base: all businesses (n=414); all businesses that employ staff (n=192).

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

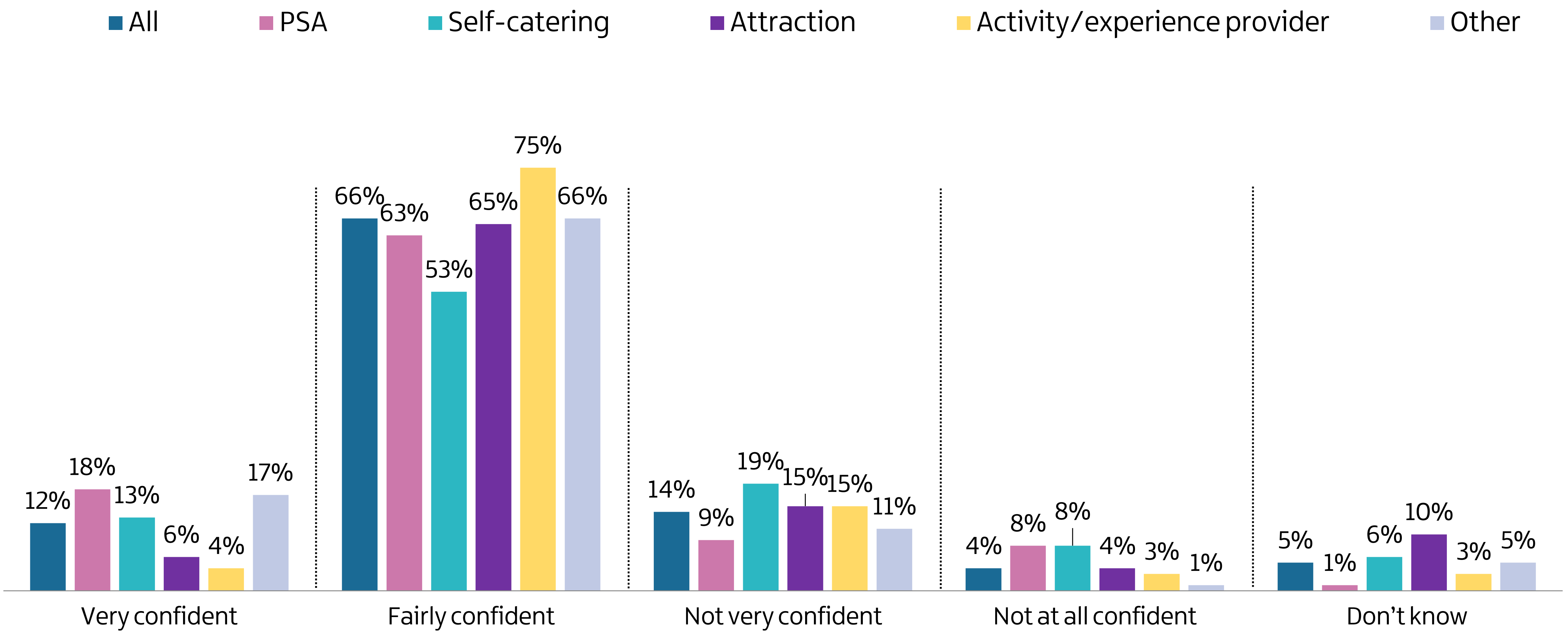


Q. Are there any particular causes for concern regarding business for the remainder of the year and for 2026?

Base: all businesses with concerns (n=348); all businesses with concerns that employ staff (n=160).

Confidence about running a tourism business profitably for the remainder of the year and in 2026

Confidence about running a tourism business profitably for the remainder of the year and in 2026



Q. How confident do you feel about running a tourism business profitably for the remainder of the year and in 2026?

Base: all businesses (n=414); PSA (n=87); self-catering (n=62); attraction (n=52); activity/experience provider (n=118); other (n=95).

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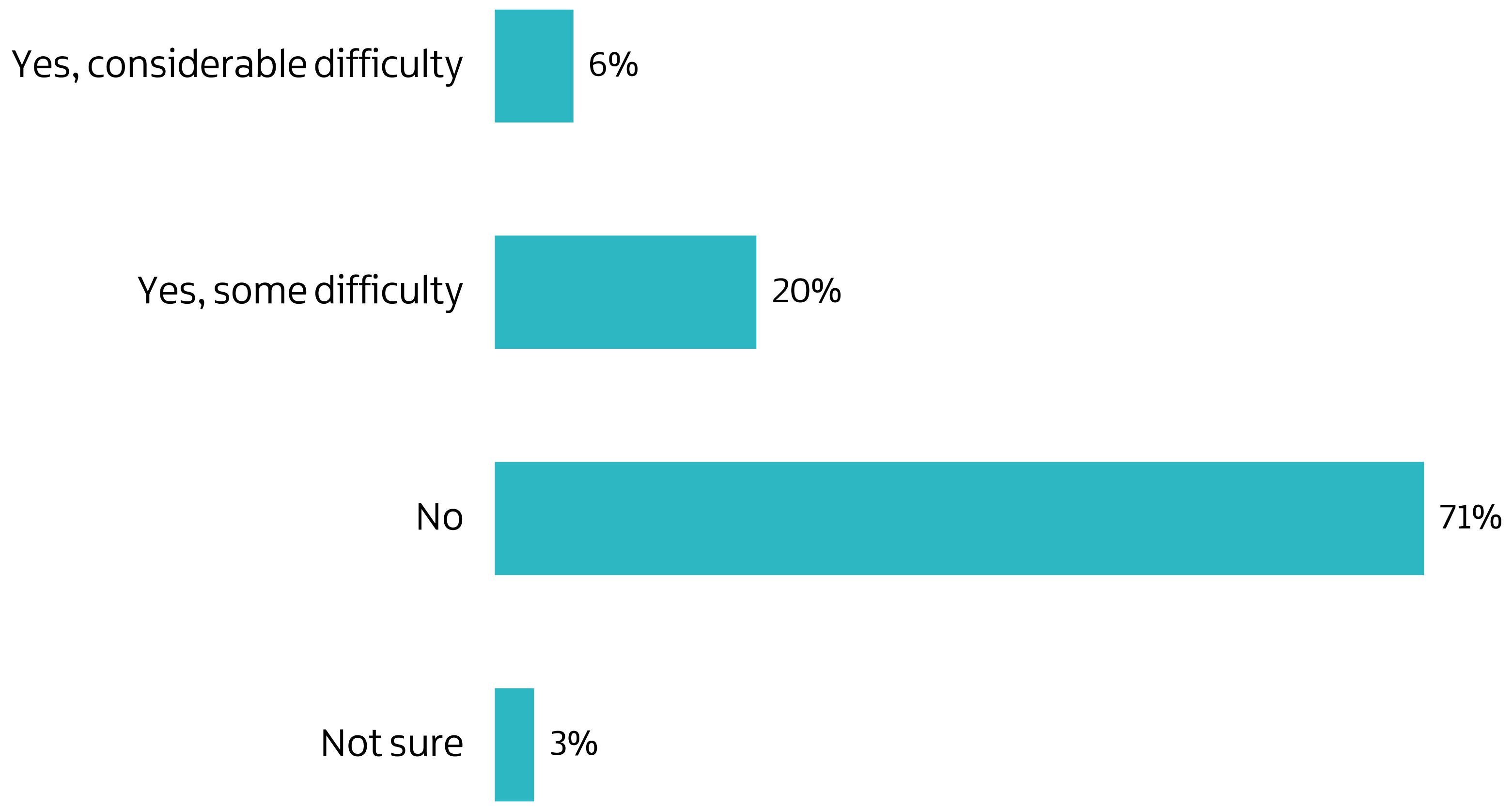
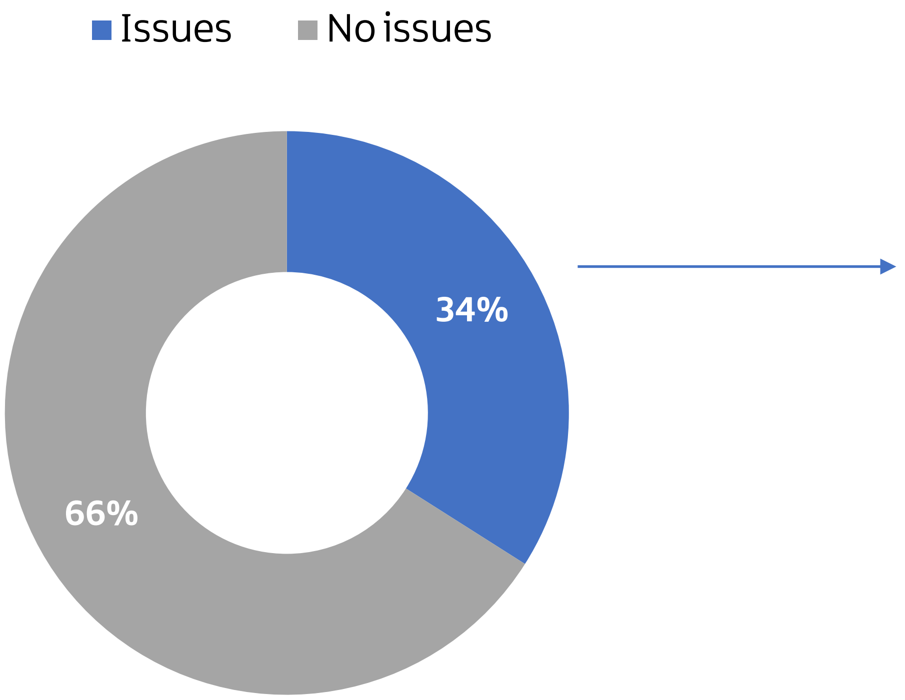
Staffing

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=192).

Issues likely to affect staff recruitment and staff costs in future



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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=192); all businesses that employ staff that cited an issue (n=65).