

TOURISM 360°

Performance Update – April 2025

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Summary

Hotel and self-catering accommodation sectors in Northern Ireland (NI) have seen minor declines in occupancy during the first two months of 2025 compared to 2024, while average rates remain slightly above last year's. Online review data suggests NI's accommodation establishments and attractions continued to deliver a positive visitor experience during the first quarter of 2025.

Looking ahead, air access for Q2 2025 has reduced compared to the same period last year. Forward booking data is mixed, with hotel bookings slightly behind last year, while self-catering bookings are broadly on a par with 2024.

The operating environment remains challenging, with fears raised about the anticipated negative impact of the Electronic Travel Authorisation and increased employment costs.

Research indicates that while cost of living impacts continue, NI travel intentions appear largely stable for Republic of Ireland (ROI) and overseas consumers. A softening in NI domestic intentions is evident, with competition from abroad particularly strong.

Despite financial pressures, travel will continue to be a priority for consumers in 2025, but value for money remains on holidaymakers' minds.

Both the hotel and self-catering accommodation sectors in NI have seen minor declines in occupancy during the first two months of 2025 compared to 2024, while average rates for both sectors have experienced small increases. Hotels have seen a small drop in rooms sold vs last year, largely due to 2024 having an extra day in February, but encouragingly an 11% growth in reserved nights is evident in NI's self-catering properties so far this year.

NI Hotel Performance January-February 2025

- STR report NI hotel room occupancy during January-February was 60.4%, slightly below the same period in 2024. Almost 346,000 rooms have been sold in NI hotels in the first two months of 2025, down 3% on the same period last year.
- NI's year-to-date average daily rate (ADR) and revenue per available room (RevPAR) are broadly on par with 2024.
- Delving deeper, Belfast has seen the largest decline in occupancy, followed by Derry~Londonderry while Regional NI* has had a more positive start to the year.

Room Occupancy	Change vs 2024
60.4%	-1.2pps

pps = percentage points

ADR	Change vs 2024
£98.09	+1.4%

RevPAR	Change vs 2024
£59.21	-0.6%

**Regional NI – All NI excluding Belfast & Derry~Londonderry*

NI Self-Catering Performance

January-February 2025

Occupancy	ADR	Reserved Nights
37%	£143.56	133,000
-1pp <small>vs Jan-Feb 2024</small>	+3% <small>vs Jan-Feb 2024</small>	+11% <small>vs Jan-Feb 2024</small>

- Lighthouse report NI self-catering room occupancy during January-February was 37%, down marginally compared to the same period in 2024.
- NI's average daily rate and nights reserved during the first 2 months of 2025 are both showing increases compared to last year.
- Performance in the month of February 2025 was relatively positive, with occupancy increasing by 3 percentage points vs February 2024, and reserved nights showing growth of 16%.

Monitoring of visitor experience scores for the first quarter of 2025 indicates that NI accommodation establishments and attractions continue 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 visitor accommodation experience by Local Government District (LGD) for January-March 2025 shows positive GRS scores across NI's regions.

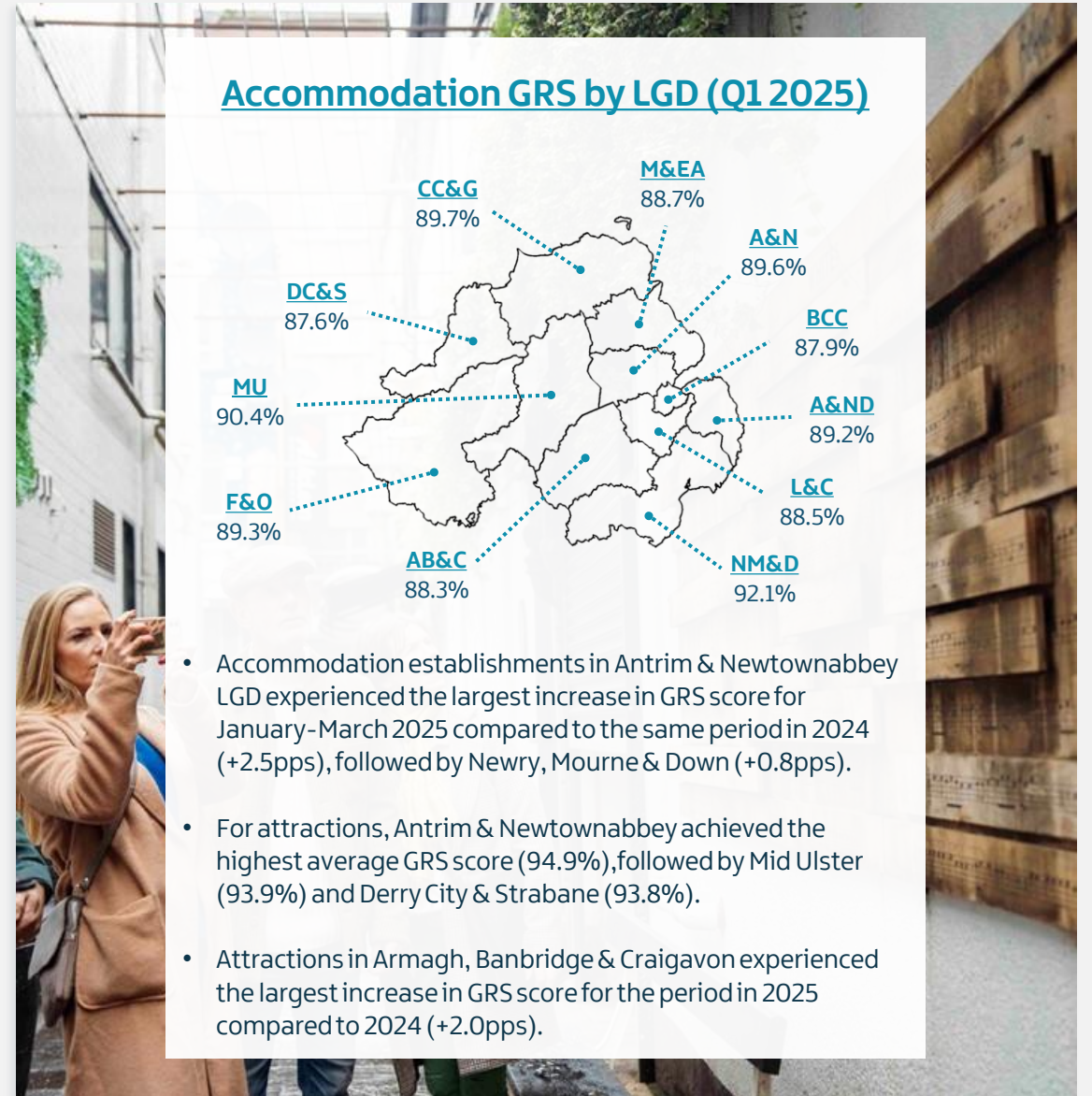
Visitor Experience January-March 2025

Global Review Score (GRS)*	
Accommodation	Attractions
89.4%	92.9%
No Change vs 2024	-0.4pps vs 2024

Accommodation & Attractions

- NI's GRS score for accommodation for January-March 2025 was on par with the score achieved by competitor regions. For attractions, NI's GRS score was slightly below the scores achieved by competitor 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.



A comparison of 2024 tourism related* cardholder spend in NI with 2023 shows an overall increase but declines in spend on accommodation. Closer to home spend has slowed somewhat, with more significant growth evident for overseas (including Great Britain) markets.

Cardholder Spend January-December 2024

- After substantial increases in tourism-related spend in NI from the ROI market in recent years, high levels of spend remain for January-December 2024 compared to the same period in 2023 (+6%). NI domestic spend increased by 3%. Tourism-related spend from Great Britain (GB) grew by 25%.
- Considerable increases in spend in eating places & restaurants contributed to these increases for GB and ROI markets.
- Overall accommodation spend was down slightly, with declines evident for the NI and ROI markets, but growth for spend on accommodation by the GB and other overseas markets.
- Tourism-related spend for international markets such as North America and Australia have shown substantial increases compared to January-December 2023. Other European and Asian markets have also shown positive levels of recovery.



*The tourism-related categories are:

- Bars/Taverns
- Eating Places & Restaurants
- Hotels/Motels/Resorts.

At A Glance

Key Tourism-Related Cardholder Spend in NI by Market: January-December 2024 v 2023

Northern Ireland	↑
Republic of Ireland	↑
Great Britain	↑
Other Overseas	↑
All Markets	+6%

Background:

The data in this report is based on transactions processed by a major card company.

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.

Civil Aviation Authority (CAA) airport data indicate that air passenger flow for NI during 2024 stood at 9.3m, up 13% on 2023. All NI airports experienced growth over this period. The number of passengers travelling on ferries to and from NI decreased slightly in 2024 compared to 2023, but not to the same extent as passengers through the two corridors in ROI.

Air Passenger Flow and Scheduled Seat Capacity


- CAA airport data indicate that air passenger flow for NI during 2024 stood at 9.3m, up 13% on 2023. All NI airports experienced growth over this period, with City of Derry Airport seeing the largest increase in air passenger flow.
- OAG airline schedule data (as of February 2024) indicate that scheduled seat capacity to NI during April-June 2025 stands at 1.5m, representing an 8% decline on the same period in 2024. Flights from GB make up over two-thirds of scheduled seat capacity to NI during this period.

- In air access news, Aer Lingus Regional has announced a new seasonal route linking Belfast City Airport and Cornwall Airport Newquay.

Airport	Jan-Dec 2024	Change vs 2023
Belfast Int'l	6.7m	+13%
Belfast City	2.4m	+13%
City of Derry	179k	+16%

Sea Access – Ferry Passengers

- January-December 2024 data indicate that the number of passengers travelling on ferries to and from NI was slightly behind 2023 levels. For comparison, the passenger numbers travelling to and from ROI has fallen by 8%, with declines evident in both the central and southern corridors.

Corridor 	Ferry Passengers January-December 2024	Change vs 2023
Northern Corridor <i>(GB to NI)</i>	2.1m	-2%
Central Corridor <i>(Dublin & Dun Laoghaire)</i>	1.5m	-8%
Southern Corridor <i>(Rosslare)</i>	436,000	-7%

Tourism Ireland conducted an online survey asking 8,000+ potential holidaymakers what they think about the island of Ireland. Respondents were from eight markets: GB, US, Germany, France, Italy, Spain, Canada and Australia. Fieldwork was conducted between 6th and 21st November 2024.

Key Findings

- **Exploration remains the key holiday need** across all markets and these needs have not changed, despite the change in timing of fieldwork from peak to off-peak.
- **Interest in visiting Ireland remains stable in the off season.** Those who have the island of Ireland in their top 3 destinations to visit for winter/spring are also more likely to mention England, Norway, Scotland and Iceland as preferred destinations versus all holidaymakers.
- **‘Beautiful landscapes and scenery’ remains the key driver** to visit the island of Ireland with tourist attractions also increasing in importance to potential visitors compared to the last wave of research (July 2024).
- **Value for money is on holidaymakers’ minds.** Half of holidaymakers think they’d get good value for money in Ireland. Previous visitors to the island of Ireland have much stronger value for money perceptions. Value for money perceptions are highest in the US.
- **Recommendations continue to be an important source of inspiration** as well as online search and social media. People love to share their holiday content and experiences, demonstrating the continued importance of delivering a great ‘on the ground’ experience.

AI For Holiday Research

Tourism Ireland’s research indicates that one in three of all holidaymakers claim they will use artificial intelligence (AI) in the future, mainly citing to save time on research. Many still enjoy the planning themselves but AI can help as a thought starter for idea creation at the early stage, demonstrating the importance of industry having a digital presence online.

Reasons Likely to Use AI to Research Next Holiday



[Click here to view the full report.](#)

VisitEngland's latest domestic sentiment research took place 3-9 March 2025. The research is based on a UK nationally representative sample of 1,500 adults, with additional boosts for Scotland and Wales. 3% of the total sample comes from NI. The latest March 2025 research indicates that travel intentions remain relatively strong. Overnight domestic and overseas trip intentions are above those anticipated when this research was conducted in March 2024.

Key Findings

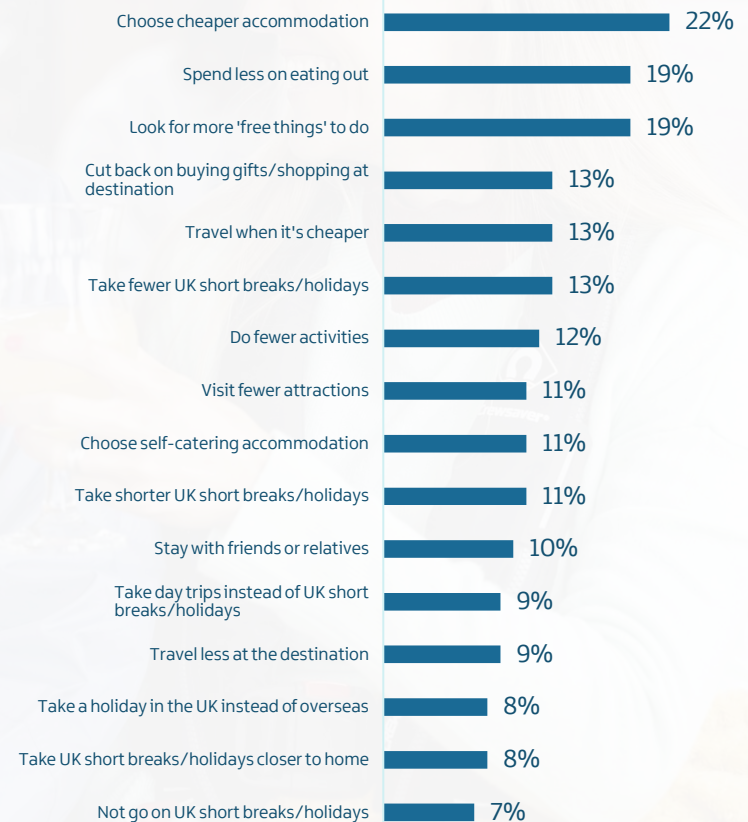
- Just over 6 in 10 (61%) adults have taken a UK overnight trip in the past 12 months, while 43% have taken an overseas overnight trip during the same period.
- 16% went on a domestic overnight trip between December 2024 and February 2025, which is in line with the same period in 2023/24 (15%).
- **Overnight domestic trip intentions are above those anticipated for 2024.** 80% are planning a trip in the next 12 months vs 76% planning to do so this time last year.
- **For overnight overseas trips, intentions are above 2024 levels,** 63% are planning an overseas trip in the next 12 months compared to 57% in 2024.
- **The top potential barriers to taking overnight UK trips in the next 6 months are 'rising cost of living' and 'UK weather'.**



[Click here to view the full report.](#)

Cost-of-Living

How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months?



The UK Consumer Confidence Barometer is conducted by GfK and reports on consumer confidence against five measures including personal finance, general economic situations and major purchase index. The ROI Consumer Sentiment Index is conducted by the Irish League of Credit Unions and reports on consumer confidence against seven measures including conditions, expectations and economic outlook.

UK Consumer Confidence



An NIQ Company

Index Score March 2024 - March 2025

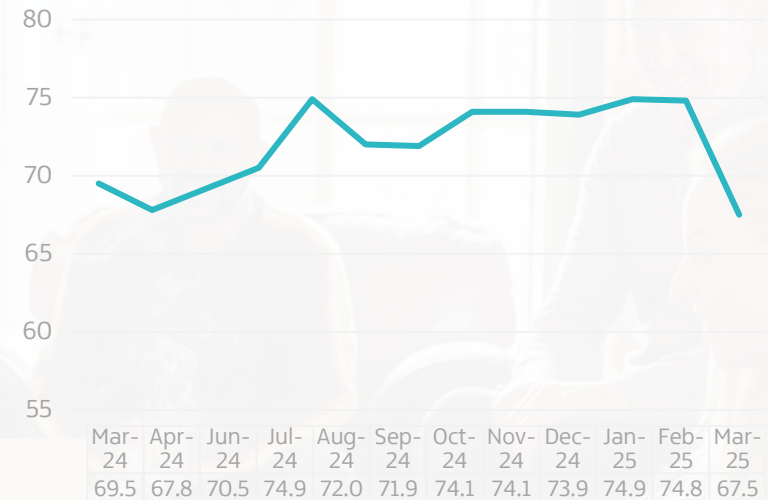


- Consumer confidence has improved by one point in March 2025 to reach -19. Views on personal finances for the past year are slightly down, while perceptions of the wider economy over the last 12 months and looking ahead a year are each up two points. The current stability is to be welcomed but it won't take much to upset the fragile consumer mood.

ROI Consumer Confidence



Index Score March 2024 - March 2025



- Credit Union's ROI Consumer Confidence Index fell from 74.8 in February 2025 to 67.5 in March 2025.
- Irish consumer confidence weakened to its lowest level in nine months in March as fears of the impact on the Irish economy of a tariff war between the US and the EU prompted a sharp downgrade in both 'macro' and 'micro' elements of the survey.

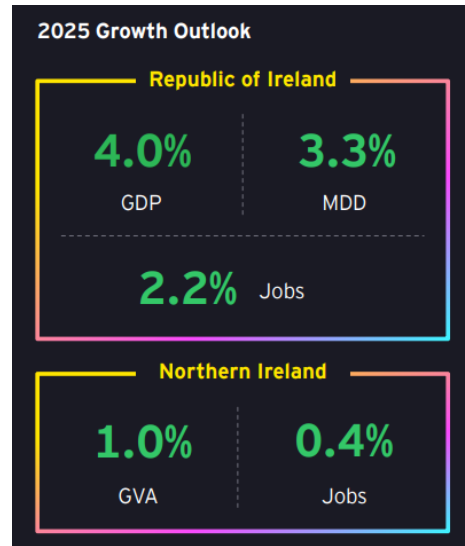
Growth is in prospect for the two economies on the island of Ireland in 2025 and into 2026 according to the latest EY Economic Eye forecasts. Meanwhile, VisitBritain has published its inbound tourism forecast for 2025, showing that international visits overall and visitor spending to the UK are expected to increase on 2024 levels.

EY – Economic Eye Spring 2025 Forecast

Note: This report was published pre-spring statement and before the US announcement regarding tariffs.

Growth is in prospect for the two economies on the island of Ireland in 2025 and into 2026 according to the latest EY Economic Eye forecasts.

- In NI, economic and jobs growth will continue albeit at a slightly slower pace than in 2024.
- The NI economy is forecast to grow by 1% this year, slightly down on the 1.2% growth in 2024, and by 1.7% in 2026, with employment to increase by 0.4% in 2025 before expanding to 0.8% in 2026.



[Click here to view the full report.](#)

2025 Inbound Tourism Forecast

2025 Inbound tourism forecast Spending by overseas visitors in the UK



VisitBritain has published its inbound tourism forecast for 2025, showing that international visits overall and visitor spending to the UK are set to increase on 2024 levels, although with varying rates of growth from across its major inbound markets. The overall forecast for spending by international visitors in the UK in 2025 is £33.7 billion, up 7 per cent on the spending predicted in 2024. Looking at the number of visits to the UK, a record 43.4 million visits are forecast, up 5% on the 41.2 million expected in 2024.

[Click here to view the full report.](#)

Tourism NI's recently released Tourism 360° Special Edition focuses on the emerging trends in tourism and consumer preferences for 2025, with specific takeouts for the NI tourism industry included throughout. The six key trends from the report are summarised below.

Tourism 360° – 2025 Trends

- Noctourism** has become a popular phenomenon, with opportunities to develop the night-time economy and encourage visitors to stay longer and spend more.
- Tech-free trips:** Offering breaks away from technology with wellness experiences is a great way to appeal to travellers prioritising mental wellbeing and those who want to relax.
- Sustainability & the 'say-do' gap** recognises the importance of making sustainability hassle-free, and to highlight the benefits for to encourage environmentally conscious choices.
- AI-powered planning:** Artificial Intelligence is becoming a powerful tool in the tourism industry, especially for trip planning and booking.
- Slow travel** is being embraced in 2025, taking trips at a more relaxed pace and reducing the number of tourist hotspots visited, holding potential to grow NI tourism in a sustainable way and support regional balance.
- Culinary adventures:** Rather than taking home a key ring or fridge magnet, local goods and traditional food & drink are becoming highly sought-after souvenirs.

Tourism 360° – 2025 Trends



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