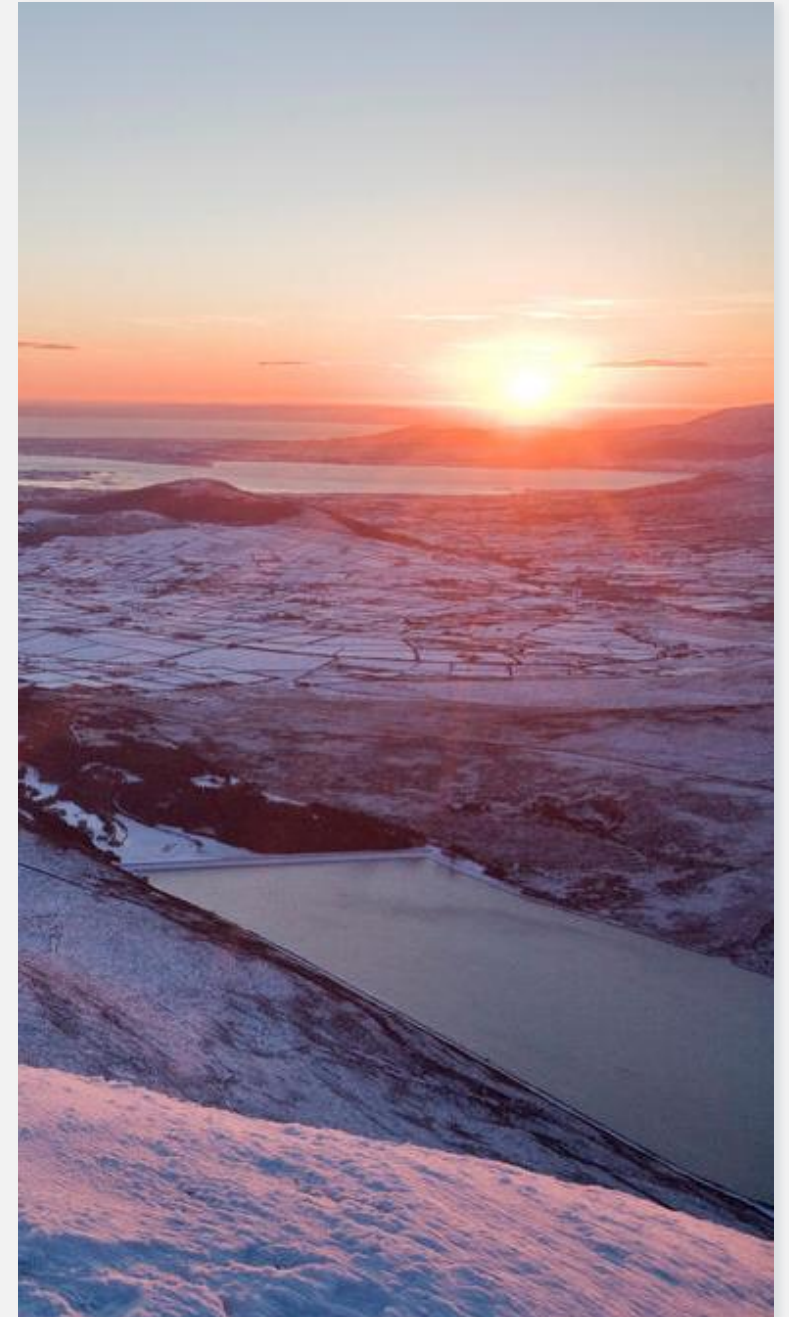
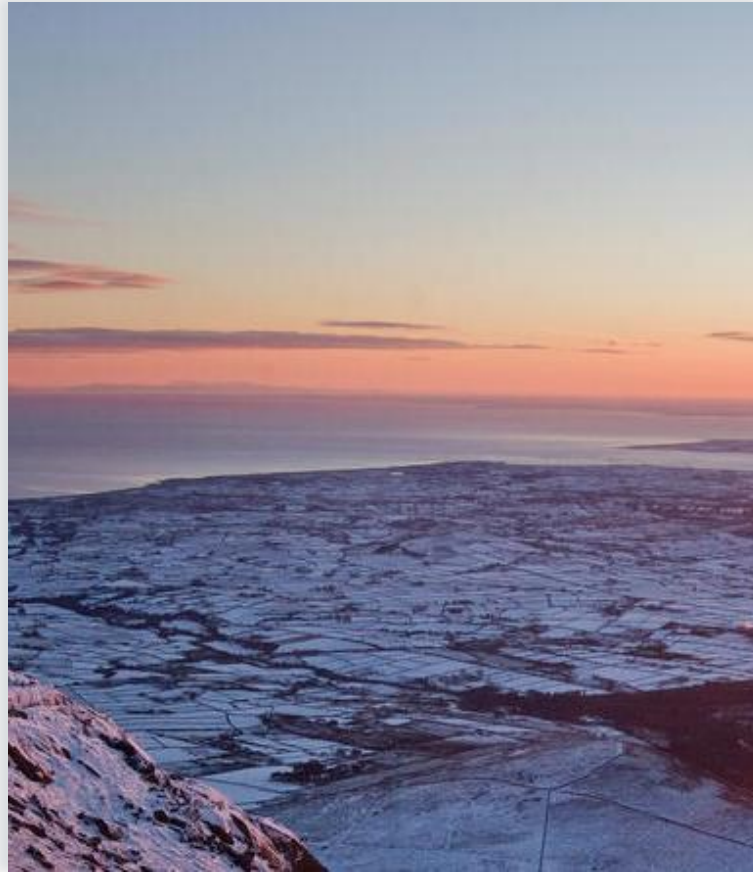




TOURISM
NORTHERN
IRELAND



TOURISM 360°

Performance Update – December 2025

Contents

- 03. Tourism Performance Statistics
- 04. NI Accommodation Performance
- 04. Conference Outlook 2025-26
- 05. Cardholder Spend
- 06. Air & Sea Access into NI
- 07. Industry Research
- 08. Consumer Sentiment Research
- 09. Consumer Confidence
- 10. Derry Halloween 2025 Review Analysis

Summary

Available performance statistics indicate a relatively flat year-to-date Northern Ireland (NI) tourism picture for 2025, with significant variations by market. NI hotel rooms sales were below 2024 levels, while average daily rates increased, and tourism related cardholder spend was down slightly. Industry research suggests a more positive performance for the first nine months of the year.

Looking ahead, forward booking data for the next few months show occupancy is slightly improved for both hotels and self-catering accommodation. The number of conference delegates NI expects to welcome between December 2025-March 2026 is up on the same period in 2024/25, with corresponding increases in economic impact.

Recently published indices report a downturn in confidence for UK consumers but a slight improvement for those from the Republic of Ireland (ROI). Consumer research indicates a drop in NI short break intentions for island of Ireland consumers for the last few months of 2025 and early 2026 (with cost-of-living increases a key barrier to taking an NI trip).

Industry outlook is mixed for the final quarter of 2025, with significant concerns prevailing around reduced consumer disposable income.

Figures released by the Northern Ireland Statistics and Research Agency (NISRA) relating to overnight trips taken in NI between January-June 2025 are presented below. Overnight trips, nights and spend each experienced slight increases during the first half of 2025 compared to the same period in 2024, driven by growth in the ROI and Great Britain (GB) markets.

Key Findings

- In the first half of 2025, 2.3 million overnight trips were taken in NI, accounting for 6.9 million nights and £512 million expenditure.
- Small increases were evident for overnight trips taken in NI and associated nights and spend compared with 2024 levels.
- The average length of stay during the first half of 2025 was 3 nights – unchanged vs January-June 2024.
- Those overnighiting to visit friends and relatives saw the largest increase in January-June 2025 vs the previous year, followed by business trips.
- Holiday trips were the most popular reason for visiting NI during the first six months of 2025, with a minor increase evident compared to the first half of 2024.
- The average spend per NI overnight trip in January-June 2025 was £222.81, 2% above the same period last year. The average spend per night (£74.66) saw a similar increase of 3%.
- A positive performance was evident for the ROI and GB markets, with increases from these markets in the first half of 2025 offsetting declines from Domestic and Other Overseas visitors.



NI hotel performance during January–October 2025 indicates that room occupancy is slightly below the same period in 2024. Derry~Londonderry has seen the largest decline in occupancy, followed by Belfast, while performance in Regional NI has been more positive this year. NI room sales fell by 3%, with average daily rate (ADR) slightly above 2024 levels, and revenue per available room (RevPAR) broadly on par.

NI Hotel Performance January–October 2025

- STR report average NI hotel room occupancy of 73.2% for January–October 2025, 1.8 percentage points below the first ten months of 2024. Over 2.1m rooms have been sold so far in 2025, down 3% on 2024.

was the first month this year in which room sales exceeded the equivalent month in 2024.

Room Occupancy	Change vs 2024
73.2%	-1.8pps

pps = percentage points

- NI's ADR is slightly up vs last year, with strong growth evident in Derry~Londonderry and smaller growth in Regional NI balancing a slight decline in Belfast. NI's RevPAR is broadly on par with 2024.

ADR	Change vs 2024
£117.32	+2.2%

RevPAR	Change vs 2024
£85.88	-0.3%

- Individual monthly performance was more positive in October, with a minor increase in occupancy evident vs last year. October 2025

Room Sales	Change vs 2024
2.1m	-3.0%

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

2025–26 Conference Outlook

Belfast & Derry~Londonderry

Dec 2025–March 26	vs Dec 2024–March 25
19 Conferences	No change
Over 6,800 delegates	+41%
Economic Impact = £6.9m	+39%

- An estimated 19 conferences are scheduled to be held in Belfast & Derry City during December 2025–March 2026, bringing over 6,800 delegates and a projected economic impact of £6.9 million.
- The data suggests that Belfast has secured much larger conferences in the outlook compared to last year. While the number of conferences remains unchanged, the total number of delegates shows an increase of 41%.
- Derry City has five conferences scheduled in the next four months compared to three in the same period last year, with an increase in both delegates and economic impact.

The conference outlook only reflects business events that directly work with and/or are supported by VisitBelfast/VisitDerry.

Tourism-related* cardholder spend in NI fell slightly in January-September 2025 compared to the same period in 2024. Accommodation spend was down 9%, with declines evident across all markets. Spend in bars decreased by 3% overall and spend in eating places & restaurants remained unchanged compared to 2024.

Cardholder Spend January-September 2025

- Domestic tourism-related spend in NI decreased and spend from the ROI market was stable. The amount spent in bars and eating places & restaurants decreased for the domestic market but increased for ROI. Accommodation spend fell for both markets.
- GB tourism-related spend in NI grew compared to the first nine months of 2024, driven by increased spend in bars and eating places & restaurants.
- Tourism-related spend from other overseas markets increased slightly in January-September 2025 vs the same period in 2024. Increases were

driven by the longer haul markets, particularly USA and Australia.

- Overall, accommodation spend fell, with declines observed in each main market area. Spend in bars also decreased and spend in eating places & restaurants remained unchanged compared to 2024.



*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-September 2025 vs 2024

Northern Ireland	↓
Republic of Ireland	↔
Great Britain	↑
Other Overseas	↑
All Markets	↓

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 show that air passenger flow for NI during the first nine months of 2025 stood at 7.1million, down 1% on the same period in 2024. January-October 2025 data for the number of passengers travelling on ferries to and from NI is up 2% vs January-October 2024. For comparison, the passenger numbers travelling to and from ROI is on par with last year

Air Passenger Flow and Scheduled Seat Capacity


- 2025 year-to-date air passenger flow was slightly below January-September 2024 levels for both of Belfast's airports, while City of Derry Airport experienced growth of almost one-third.
- Belfast International Airport accounted for 73% of NI's total air passenger flow, with George Best Belfast City Airport making up approximately one-quarter of passenger flow and City of Derry making up 2%.
- In air access news, EasyJet has launched its first flight on a new domestic route from Belfast City

Airport to Edinburgh.
This commenced on 26 October
and will operate five times a week.

Airport	Jan-Sep 2025	Change vs 2024
Belfast International	5.1m	-1%
Belfast City	1.8m	-2%
City of Derry	165k	+30%

Sea Access – Ferry Passengers

- Data for January-October 2025 indicate that the number of passengers travelling on ferries to and from NI was up 2% compared to levels seen in 2024. For comparison, passenger numbers travelling to and from ROI experienced no change, as the growth evident in the southern corridor has been cancelled out by a decline in passengers through the central corridor.

Corridor 	Change vs 2024
Northern Corridor <i>(GB to NI)</i>	+2%
Central Corridor <i>(Dublin & Dun Laoghaire)</i>	-3%
Southern Corridor <i>(Rosslare)</i>	+11%

Tourism Northern Ireland commissioned a survey in October with Northern Ireland's tourism industry to monitor 2025 year-to-date business performance, including outlook for the remainder of the year, as well as causes of concern and reasons to be optimistic. The research indicates generally positive industry performance during January-September 2025 for the closer-to-home and international markets, however the business outlook is mixed, with an operating environment that remains challenging across all key sectors.

Key Findings

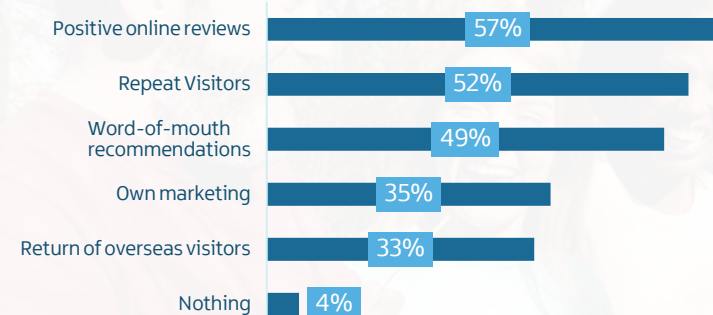
- The majority of businesses reported turnover exceeding or the same as January-September 2024, with paid serviced accommodation providers particularly positive.
- A considerable proportion of businesses reported growth across the NI domestic, ROI and GB markets, although a minority of just under one in five experienced a decline in visitor volumes from these key markets compared to the same period in 2024.
- Most businesses have seen international visitor volumes either exceed or match 2024 volumes, with just over one-fifth reporting a decline on the previous year.
- Golf/The Open Championship was the most identified contributing factor by those businesses reporting growth for the closer-to-home and international markets.
- Industry outlook for the final quarter of 2025 is mixed, with around one-fifth anticipating reduced business, and one-quarter expecting increased trade, compared to last year.
- Significant levels of concern continue to prevail regarding the adverse impact of reduced consumer disposable income.



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

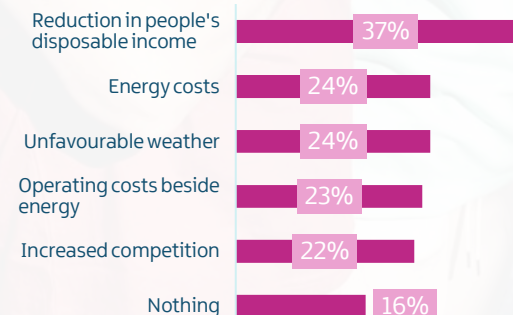
Reasons to be Positive

Are there any particular reasons to be positive about business for the remainder of the year and for 2026?



Causes for Concern

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



Tourism NI's latest consumer sentiment research in NI and the ROI was undertaken in October 2025 with a robust, nationally representative sample from both markets (750 adults in ROI and 400 adults in NI). Findings indicate reduced NI trip intentions for the domestic and ROI markets in the last quarter of 2025 and early 2026. Increased cost of living, concerns over personal finances and the cost of accommodation are key barriers to taking an NI trip for both NI and ROI consumers.

Key Findings

- Satisfaction with recent NI trips remains strong for both NI and ROI consumers, with the vast majority reporting that expectations were either met or exceeded.
- The range of things to do and see, the choice of places to eat & drink, and the welcome and hospitality were particularly highly rated by consumers in both markets.
- ROI and NI consumers continue to view NI as offering better value for money than ROI and GB, with shopping and public transport considered good value for money by both markets.
- Alongside reduced travel intentions to NI for the rest of the year and early 2026, there has also been a slight decline in NI and ROI consumers considering an overseas break in the next six months.
- Around two fifths of consumers in both markets said that, compared to the same time last year, they have less disposable income to spend on holidays and other leisure activities.
- The rising cost of living continues to affect the majority of consumers in both markets.



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

Barriers to Travel

Top barriers to taking a short break or holiday in NI in the next 6 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



UK Index Score November 2024 – November 2025

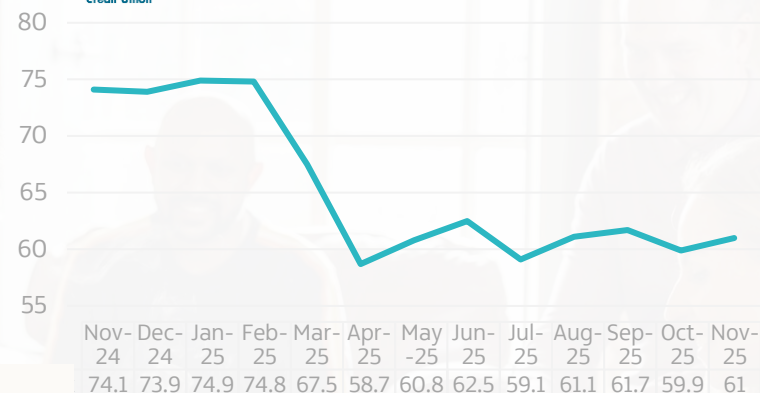


- GfK's long-running UK Consumer Confidence Index fell by two points to -19 in November. All measures declined from October's results, suggesting the public was bracing for potentially difficult news in the Autumn Budget, with little in the current climate to lift expectations. We will monitor the impact of the Autumn Budget on UK confidence when the December data is available.

ROI Consumer Confidence



Index Score November 2024 – November 2025



- Credit Union's ROI Consumer Confidence Index rose from 59.9 in October 2025 to 61.0 in November 2025.
- Irish consumer sentiment improved slightly in November as reduced nervousness about the economic outlook and a seasonal uptick in spending plans more than outweighed continuing concerns around household finances. The upgrade to the economic outlook meant that Irish consumer sentiment showed an improvement in contrast to declines in consumer confidence in the UK.

A deep dive into the visitor experience in Derry City & Strabane District Council during the Halloween period (23/10-25 – 06/11/25) shows an increase in the Global Review Score (GRS)* for accommodation and attractions, compared to the previous month.

Global Review Score (GRS)*	
<u>Accommodation</u>	<u>Attractions</u>
86.0%	95.4%
+0.8pps vs previous month	+3.0pps vs previous month

Review Analysis

- Derry City & Strabane accommodation establishments and attractions achieved very positive GRS scores for the Halloween period, at 86.0% and 95.4% respectively.
- The attractions' GRS score increased by 3 percentage points compared to the previous month, while the GRS for accommodation grew by 0.8 percentage points.
- The friendly staff, great atmosphere and excellent food, which were frequently highlighted in reviews, contributed to the positive visitor experience. The small number of negative reviews mainly referred to the high cost of accommodation during the period.

**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.*

Tourism 360° – Mailing List

Receiving Information and updates from Tourism NI

By submitting this form you will be signed up to the following subscription lists:

☐ **News, Events & Insights**

Ezines containing news, research and insights, updates, opportunities and upcoming events from Tourism NI. It also includes our regular publication Tourism Spotlight.

☐ **Business Tourism & Travel Trade**

Expressions of interests for upcoming international tradeshows, networking opportunities, virtual workshops & showcases, B2C events and news and product updates.

☒ **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.

To ensure you stay informed on the latest tourism performance statistics, consumer and industry research and insights, join our Tourism 360° mailing list by completing [this newsletter sign up form](#) and selecting 'Tourism 360' (as shown above) along with any other information you may be interested in.



[Click here to sign up.](#)



This report was produced in December 2025 by Tourism NI's Insights & Intelligence Service.

