

Trends in Overseas Tourism to Northern Ireland

Alice Mansergh, CEO of Tourism Ireland

Growing the value of overseas tourism

Tourism Ireland:
Founded in 2002

“Increase tourism to the island of Ireland, and support Northern Ireland to realise its tourism potential”



16

OFFICES

COLERAINE
DUBLIN

14

MARKETS

Northern Ireland's overseas tourism growth journey

10X

Interest in visiting from overseas since 2002

+100%

Growth annual overseas visitor spend NI 2024 vs 2010

+100%

Ambition for overseas visitor revenue by 2035



2025: opportunities and challenges

5 newspaper headlines:

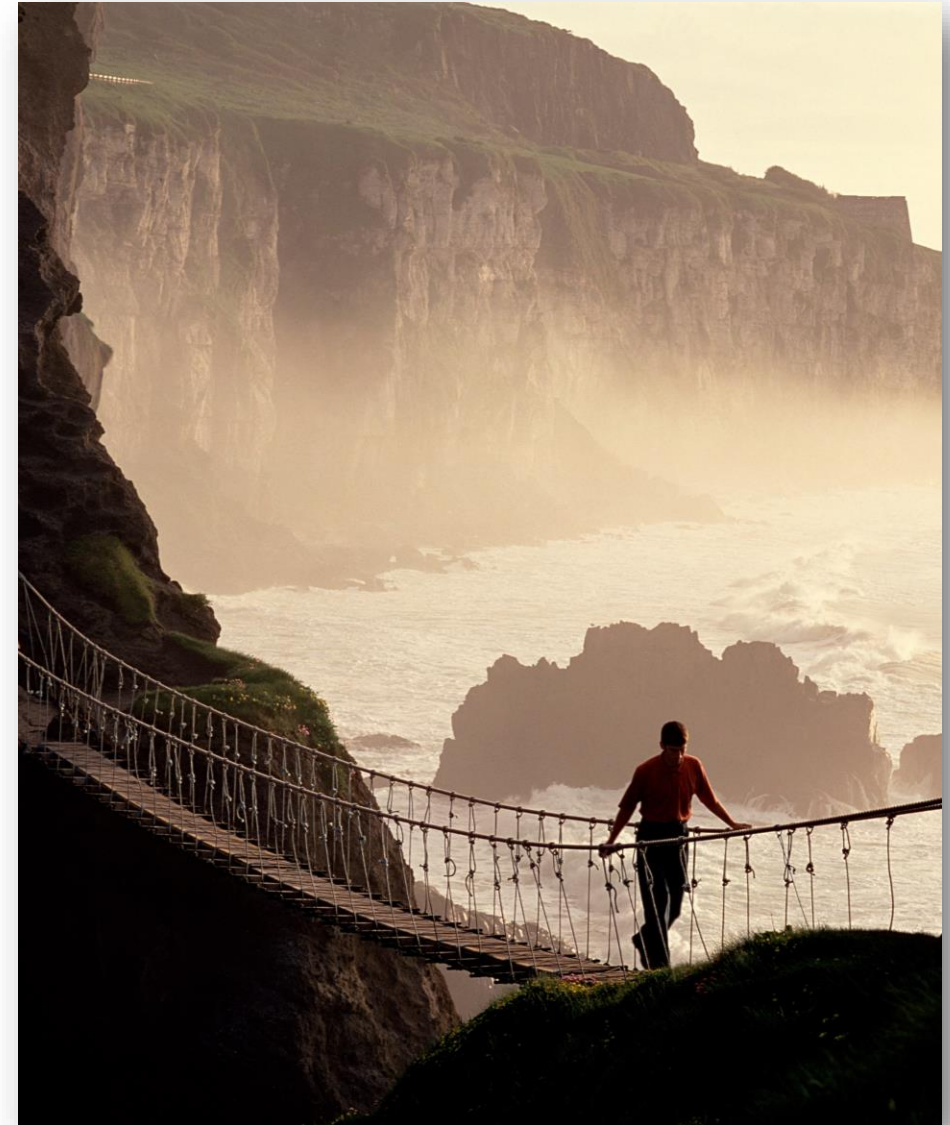
**Open for business: NI hotels are teeing up
for economic success**

**Navigating a New
Age of
Macroeconomic
Uncertainty**

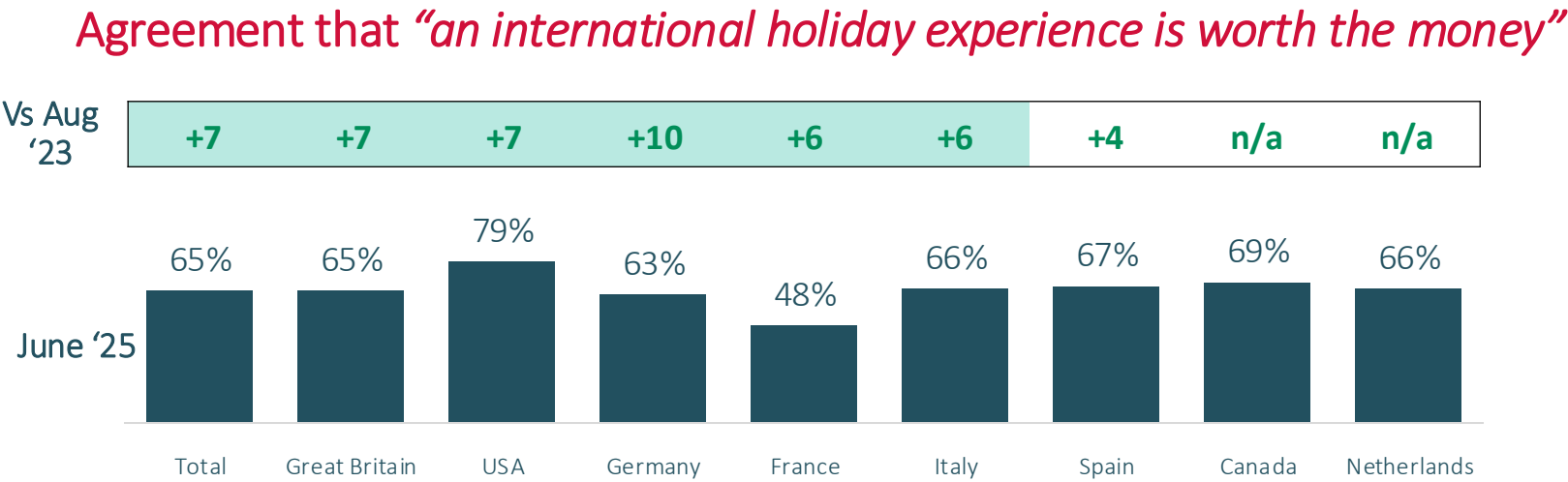
**Golf tourism revenue
reaches record level in
Northern Ireland**

**Concerns new fee will hamper tourism
in Northern Ireland**

**NI hospitality businesses 'squeezed'
due to rising costs**



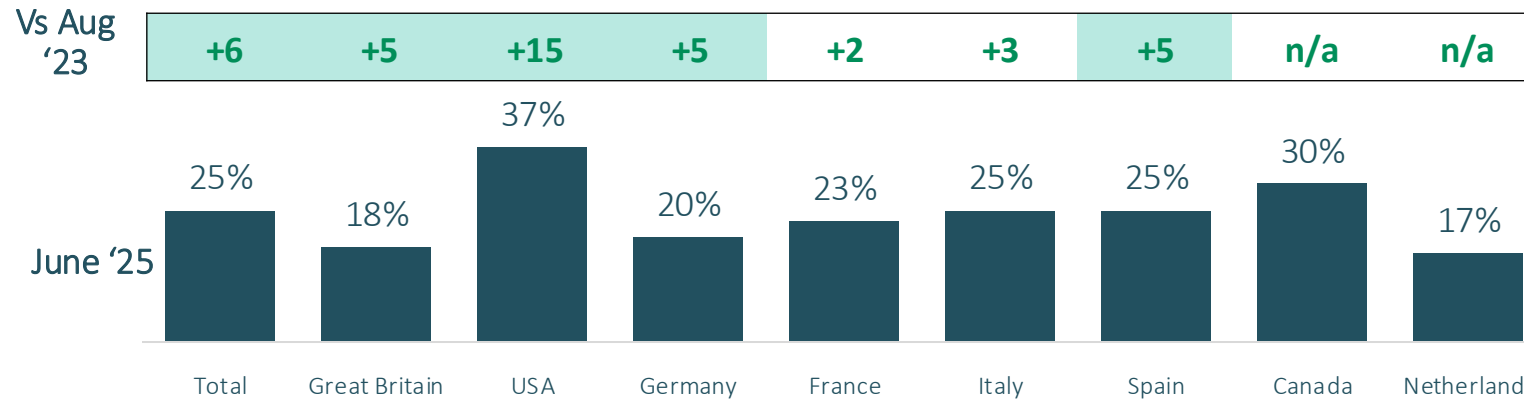
Let's look at consumer sentiment overseas



65% value international holidays as worth the money

Macro-economics are impacting consumers overseas

Agreement that *"everything's too uncertain to book anything right now"*



58%

I do a lot of research into the cost of everything before I decide where to go

41%

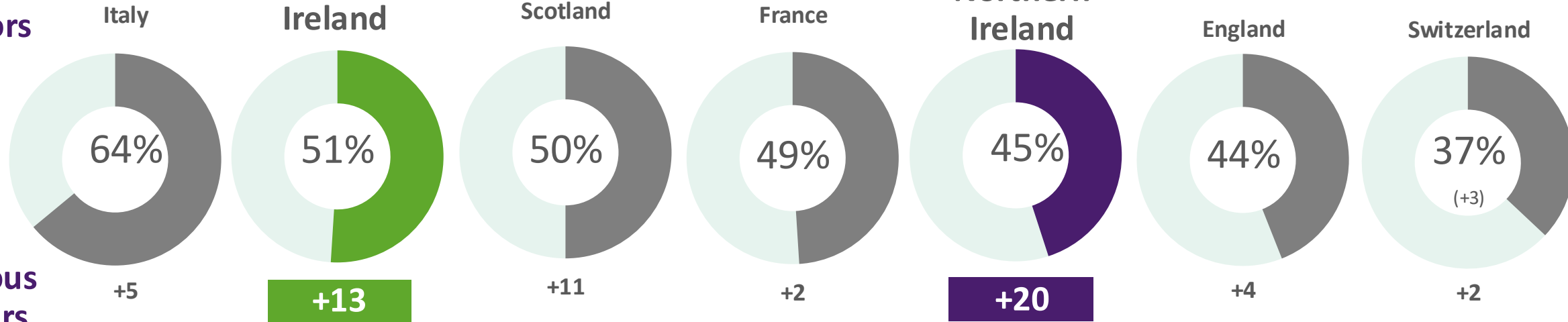
The cost of day to day living means I can't afford to go away as often

25% feel things are too uncertain to book, with 41% cutting back

Value perceptions highest amongst past visitors

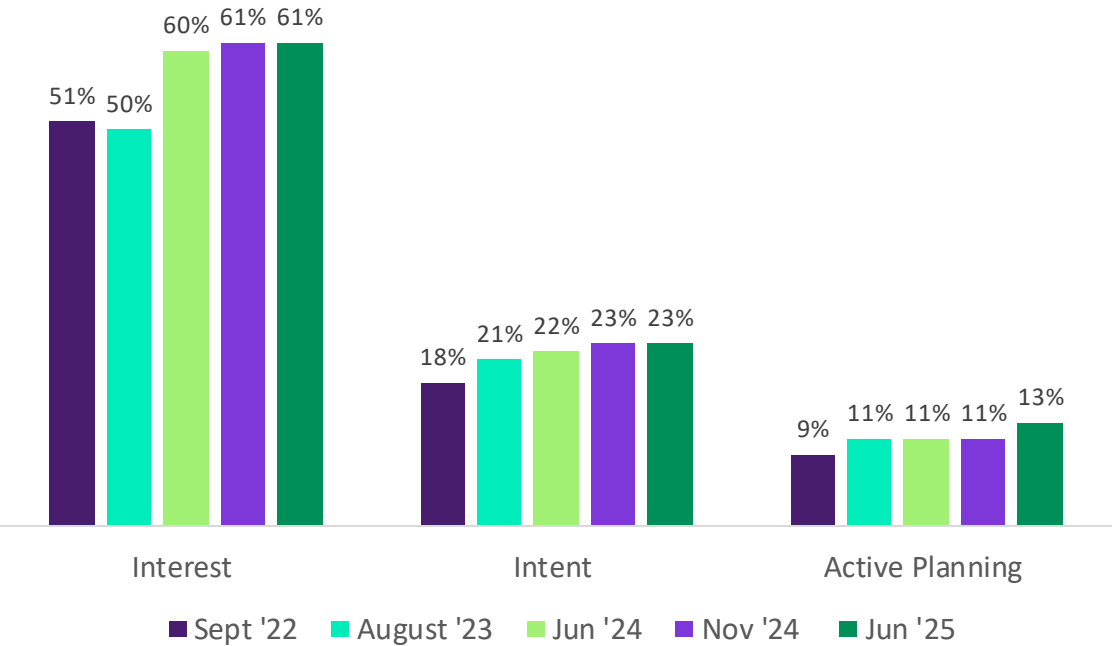
Prospective
Visitors

Previous
Visitors

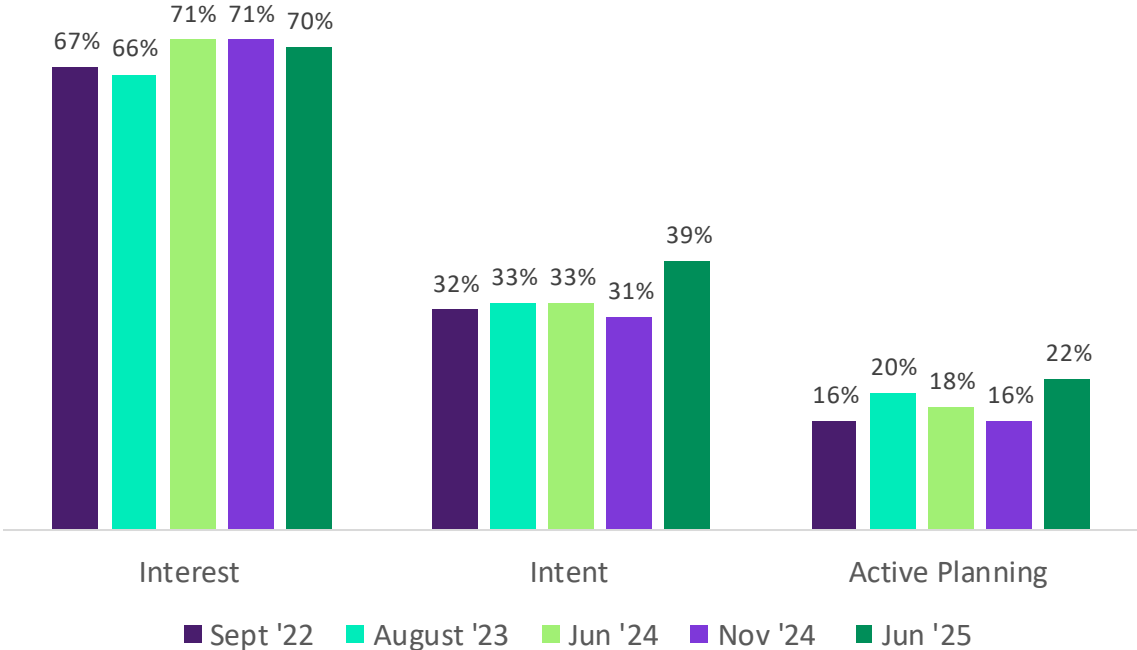


Interest in visiting NI is growing

GB holidaymaker funnel for Northern Ireland



US holidaymaker funnel for Northern Ireland



Strong interest, intent and active planning to visit NI

Reasons to visit NI, according to overseas consumers



27% Scenery

Most motivating for Germany & France



15% 'New to me'



11% Culture

Most motivating for GB



10% Attractions

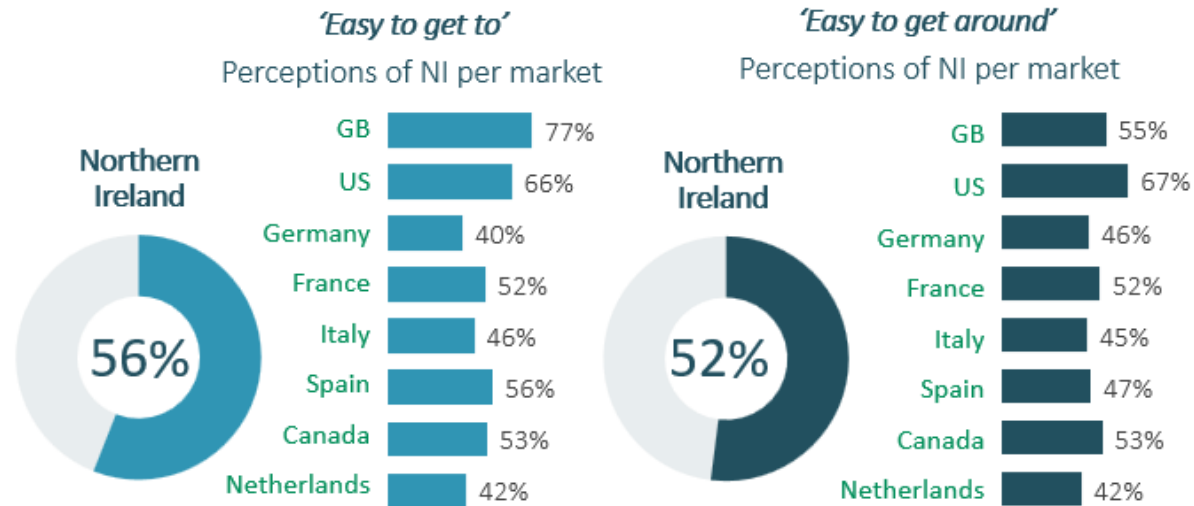
Nuanced: also a reason NOT to visit for 7%



8% Political History

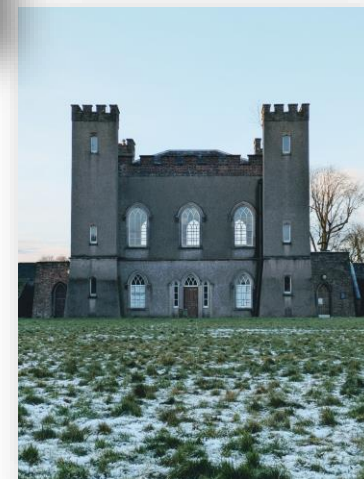
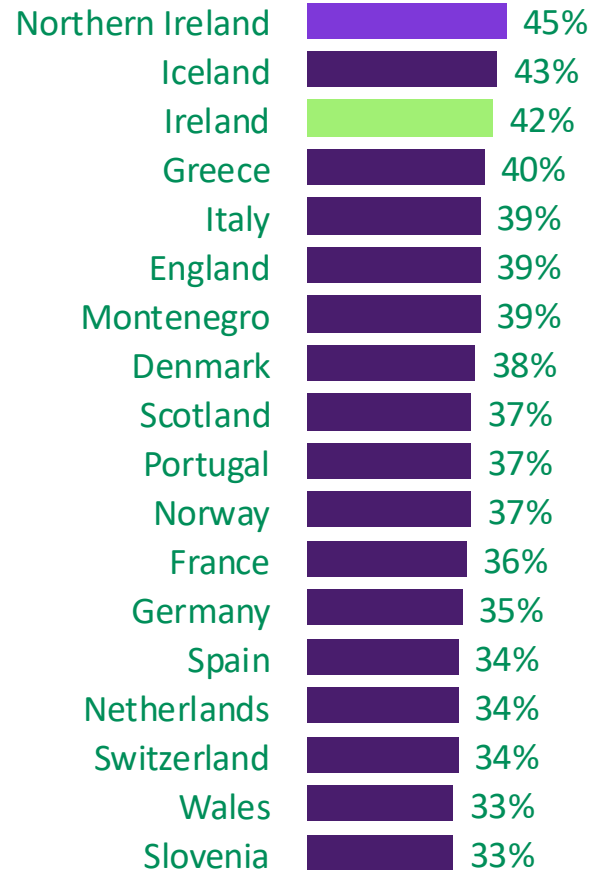
Exploration of scenery, culture, history, sights are reasons to visit

Connectivity: getting here, and getting around



After the trip, overseas visitors share footage on socials

Instagram



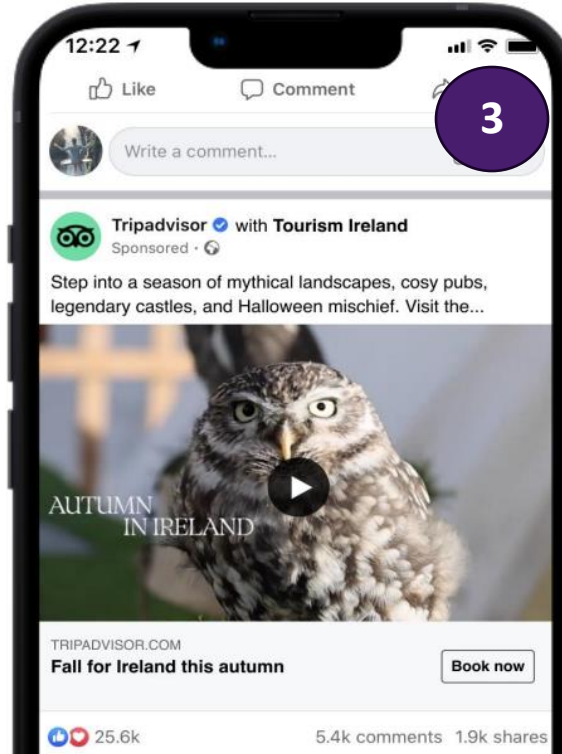
Visuals are a powerful part of travel planning and sharing

How overseas visitors choose where to travel...



Besides word of mouth, digital, social & film matter, AI is rising

Tourism Ireland: upcoming activities



Targeting £1.3B overseas visitor spend by 2035

