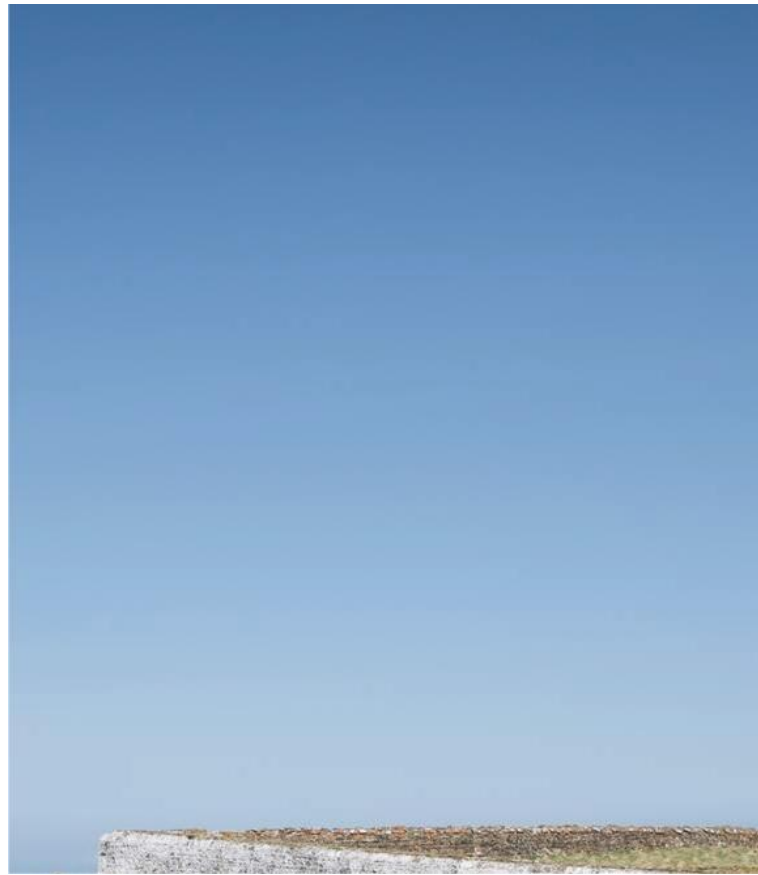




Naomi Waite

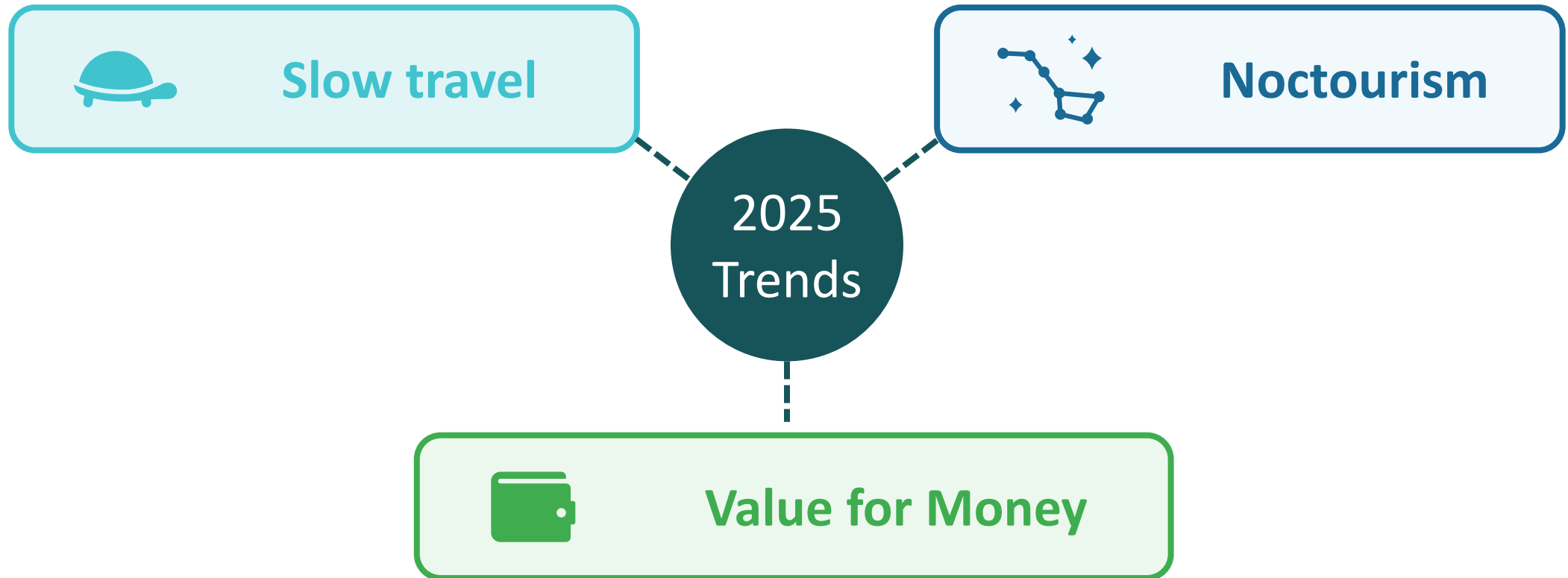
30 September 2025



TOURISM
NORTHERN
IRELAND

Some Key Trends

While cost-of-living concerns remain present, consumers are still prioritising travel in 2025. Value is important, and key trends align with our vision to help grow tourism sustainably.



Consumer Sentiment Research



Tourism Ireland Sentiment Tracking

Despite ongoing global uncertainty and financial pressures, interest in visiting Ireland remains stable. Sustainability, ease of access, and value for money are growing priorities.



VisitBritain Domestic Sentiment Tracker

Due to the cost-of-living crisis, most UK adults (59%) are either 'cautious and being very careful' (44%) or have been 'hit hard and are cutting back' (15%). Despite this, travel intentions remain strong for overnight domestic and overnight overseas trips.



UN Tourism World Tourism Barometer

Globally, tourists will continue to seek value for money, but could also travel closer to home, make shorter trips or spend less, in response to elevated prices.

Tourism NI Consumer Sentiment Research

- Relaxation remains the top motivator for domestic breaks among NI consumers, while fun drives ROI visitors to NI.
- Both markets continue to see NI as offering better value than ROI and GB, especially for shopping and public transport.
- Personal finances remain a key influence on travel decisions, reinforcing the need to promote NI's value and standout visitor experiences.

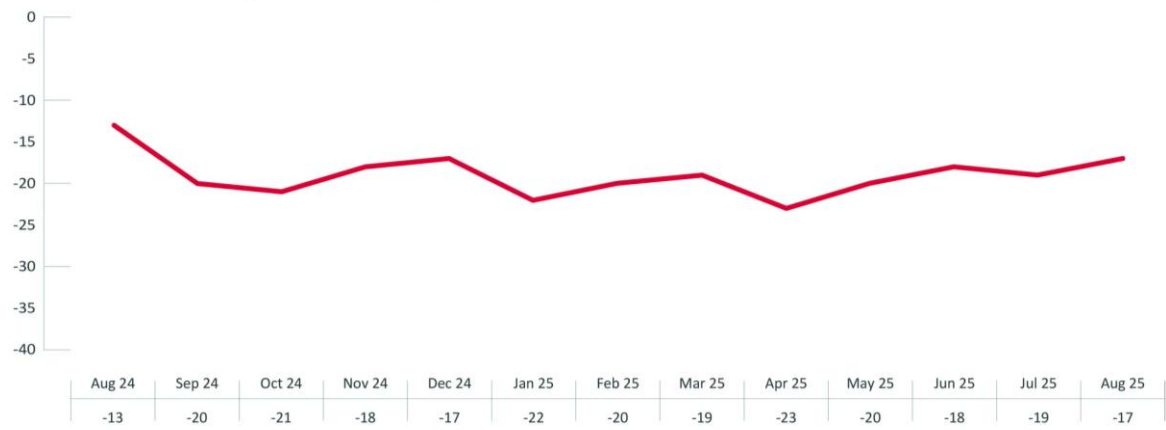


Consumer Confidence

UK Consumer Confidence Index



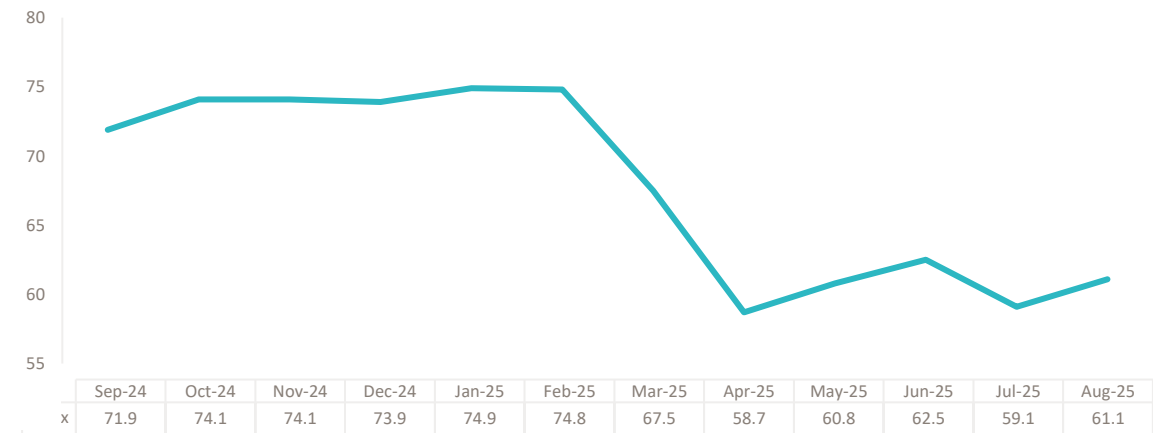
UK Index Score August 2024 – August 2025



ROI Consumer Confidence Index

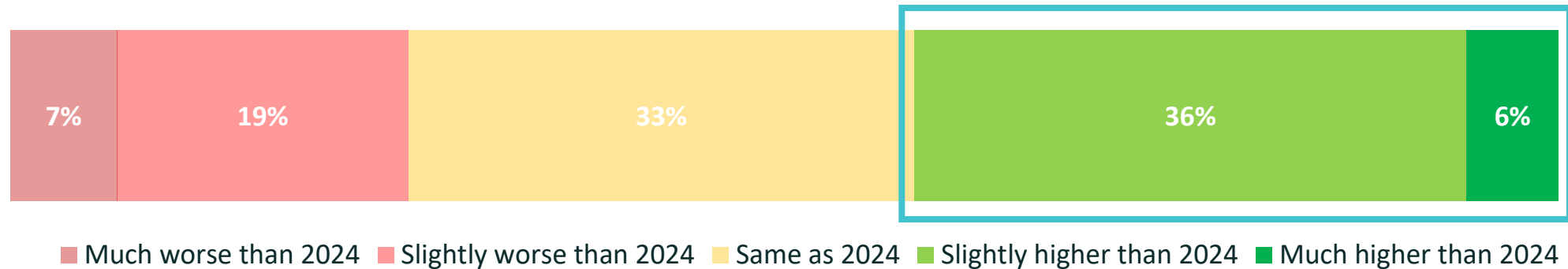


ROI Index Score August 2024 - August 2025



Industry Research – Expectation for July-Sep 2025

Q. Thinking about the upcoming summer months (July to September 2025), how do you feel the volume of your overall business will compare with the same period in 2024?



Over 4 in 10 businesses anticipating increased business volumes Vs the previous summer and around one-quarter expecting declines.

Industry Research – Staffing & Recruitment



3 in 10

**businesses are
experiencing difficulty in
recruiting staff**

October 2024



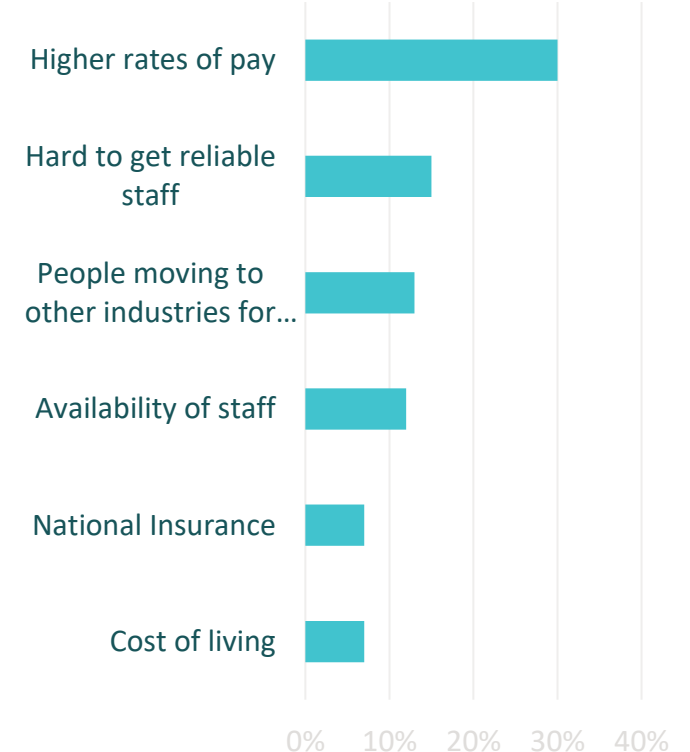
June 2025



+10pps

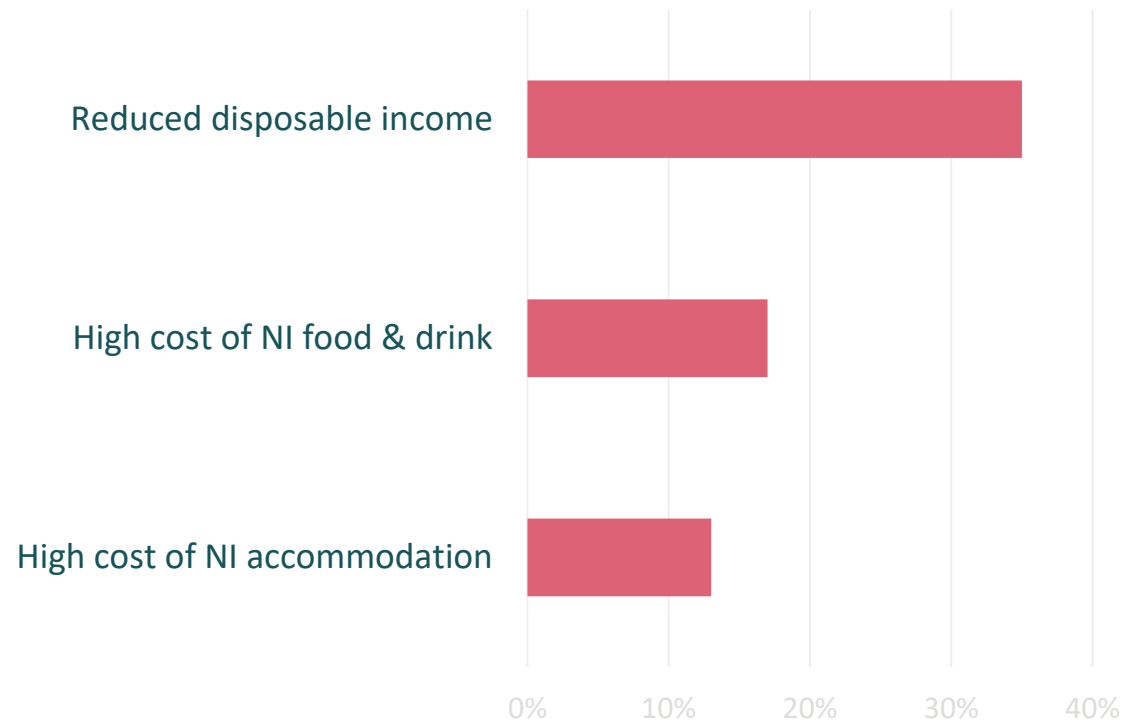
**the no. of businesses facing
difficulty recruiting staff
has increased since our last
survey**

Issues likely to affect staff recruitment & costs in future

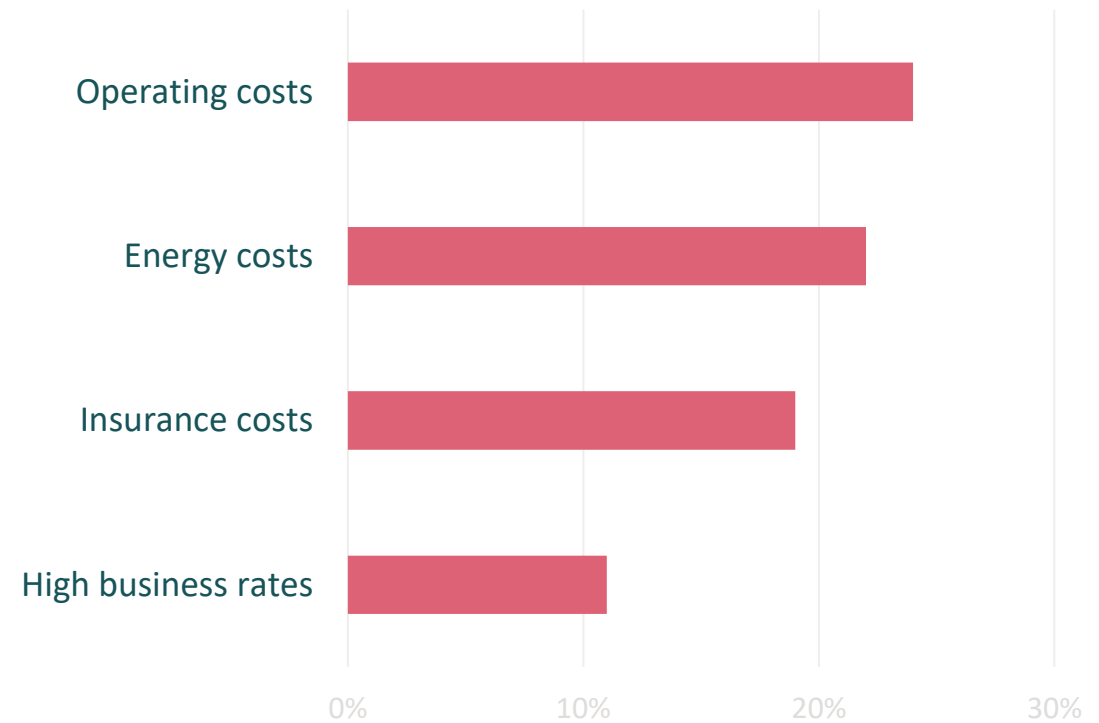


Industry Research – Main Causes for Concern

Consumer Demand Constraints



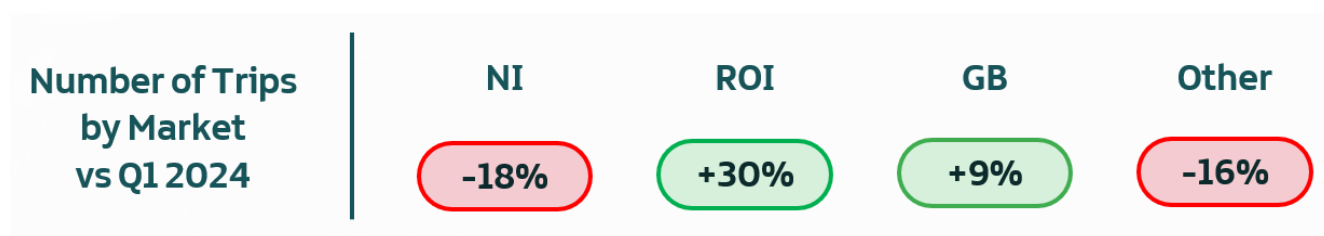
Industry Supply Constraints



Industry Research – Main Reasons to be Positive

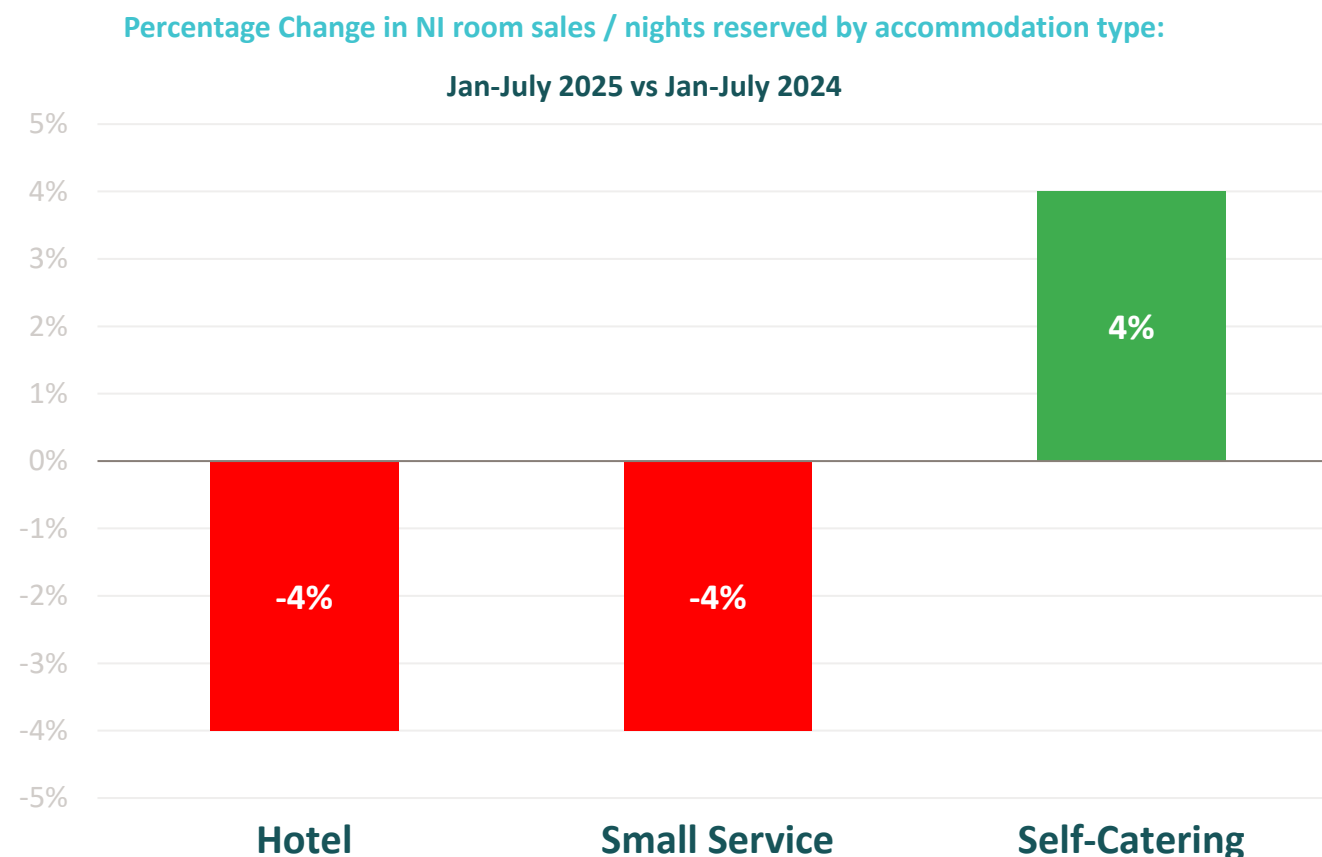


Tourism Performance Stats (Jan-March 2025)



- Cost of living and reduced disposable income are having a major impact on travel behaviour.
- Travel still a priority but visitors are taking shorter trips and spending less.
- Strong growth in the ROI market, with consumers viewing NI as better value and consistently rating their NI experience as excellent.

NI Accommodation Performance (Jan-July 2025)



- Hotel and small service accommodation have seen declines in room sales in January-July 2025.
- Conversely, self-catering has seen growth in nights reserved.
- Potentially linked to self-catering being seen as more affordable and allowing more flexibility to save money and dine in.

Cardholder Spend Data (Jan-June 2025)



- Tourism-related cardholder spend in NI for Jan-June 2025 **remained largely unchanged** compared to the same period in 2024.
- **Hotel spend declined** overall, reflecting the drop in occupancy and sales figures.
- **Domestic spend on accommodation decreased** by 12%, aligning with consumer sentiment research that showed many NI residents planned to take fewer overnight breaks due to financial pressures.



Visitor Experience: Accommodation



Analysis of Online Reviews: Summer 2025

Friendly staff

Great breakfast/food

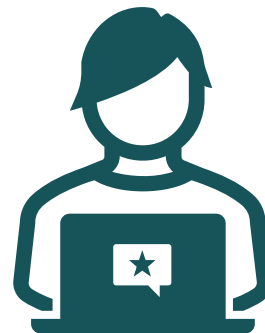
Good location

Comfortable rooms

Issues with the room, e.g. small, lack of comfort, outdated...

Expensive

No air conditioning



Visitor Experience: Attractions



Analysis of Online Reviews: Summer 2025

Great tour guides

Warm and welcoming staff

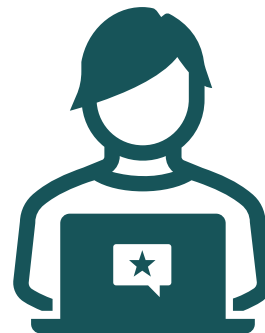
Rich history

Gift shop praised

Expensive tickets

Issues with parking

Lack of customer service



What is search telling us?

Organic Search

Event Listings

What's On

Things to do

Accommodation

Paid search

Accommodation

The most common user journeys are:

Home page --> Event Listings - What's On

Home page --> Accommodation.

☐		Google Ads query ▾	+
☐		Total	
☐	1	things to do in belfast	
☐	2	discover northern ireland	
☐	3	spa hotels northern ireland	
☐	4	spa breaks northern ireland	
☐	5	things to do in northern ireland	
☐	6	what to do in belfast	
☐	7	hotels northern ireland	
☐	8	glamping northern ireland	
☐	9	things to do belfast	
☐	10	discover ni	

Competitive Marketing Landscape

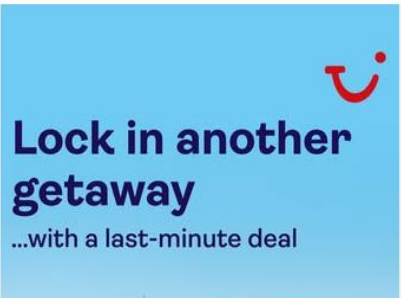
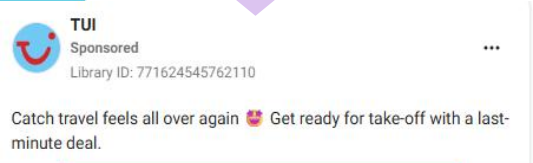
Tourism-related advertising spend accounts for just 6% of overall spend across the Island of Ireland



first dibs on our amazing holidays!
Whether it's your dream hotel, preferred local airport, or perfect flight times, booking early ensures you get exactly what you want at a great ...



Ad spend in the ROI Market continues to grow, with a 11% increase in 2025 compared to the same period in 2024. (£42 million YTD)



What can we do?

Make the prospective visitor feel it.

Show the visitor how we're unique

Drive action via peer to peer

Be present where visitors are planning

Make it personal.

Give Embrace a Giant Spirit a tangible emotional hook.

Strengthen our differentiation to combat value challenges.

Enhance our use of "social proofing" to turn interest into action

Replicate the impact we have in broadcast channels in digital & social

Make visitors feel like individuals, not tourists.



In Conclusion

- We need to continue to demonstrate value for money
- We need to provide unique, authentic experiences and excellent customer experience to be considered worth it
- We need to lean into motivations of fun, relaxation and wellness
- We need to compete in a crowded marketplace

We are stronger together



TOURISM
NORTHERN
IRELAND

Thank you

