

Tourism Northern Ireland Consumer Sentiment Research

NI Market – Wave 20

Research conducted March/April 2026





Research background

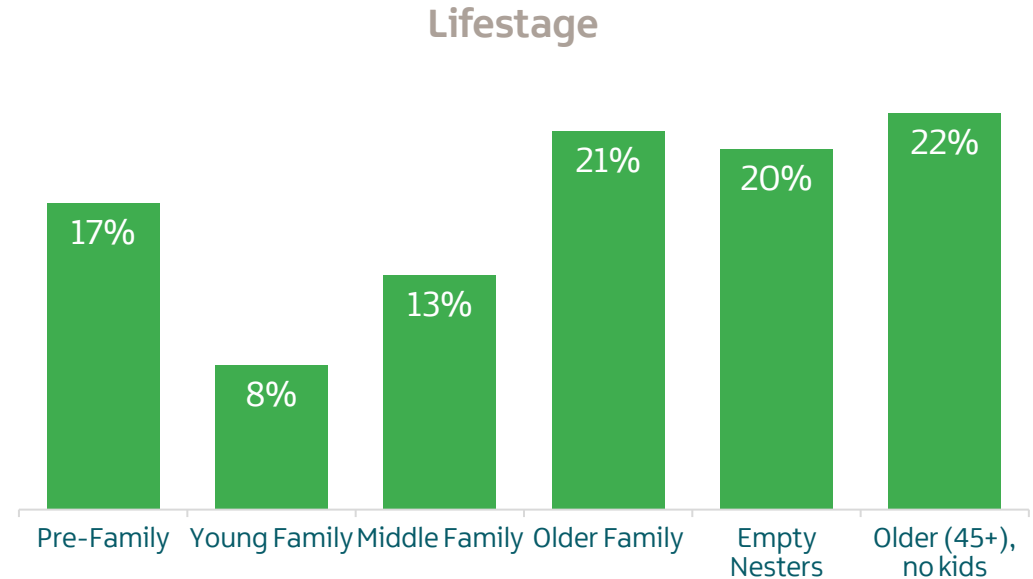
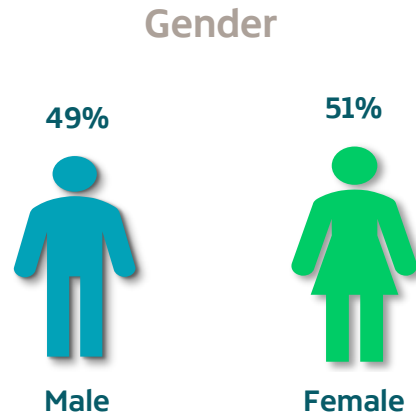
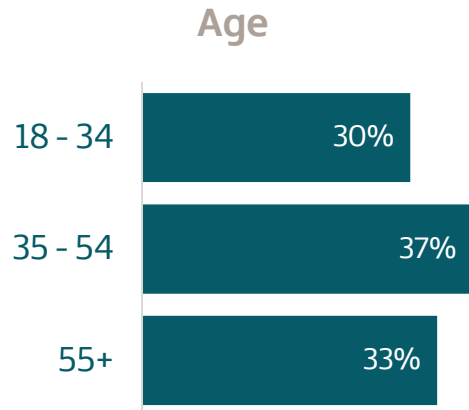
Research background & objectives

This is the 20th wave of our consumer sentiment research in the Northern Ireland market. We have continued to look at consumer attitudes towards travel in NI and elsewhere, monitoring changes into 2026.

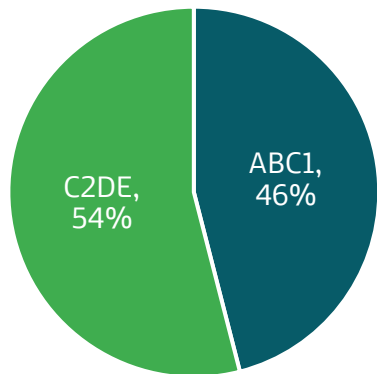
Objectives:

- Understand recent travel experiences in NI.
- Assess current attitudes towards travel in NI, ROI and further afield.
- Understand what impact cost of living increases and other broader factors including geopolitics are having on the above.

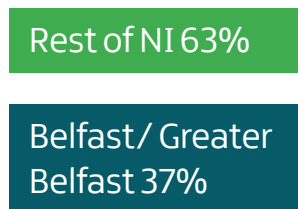
We spoke to a robust, nationally representative sample in Northern Ireland



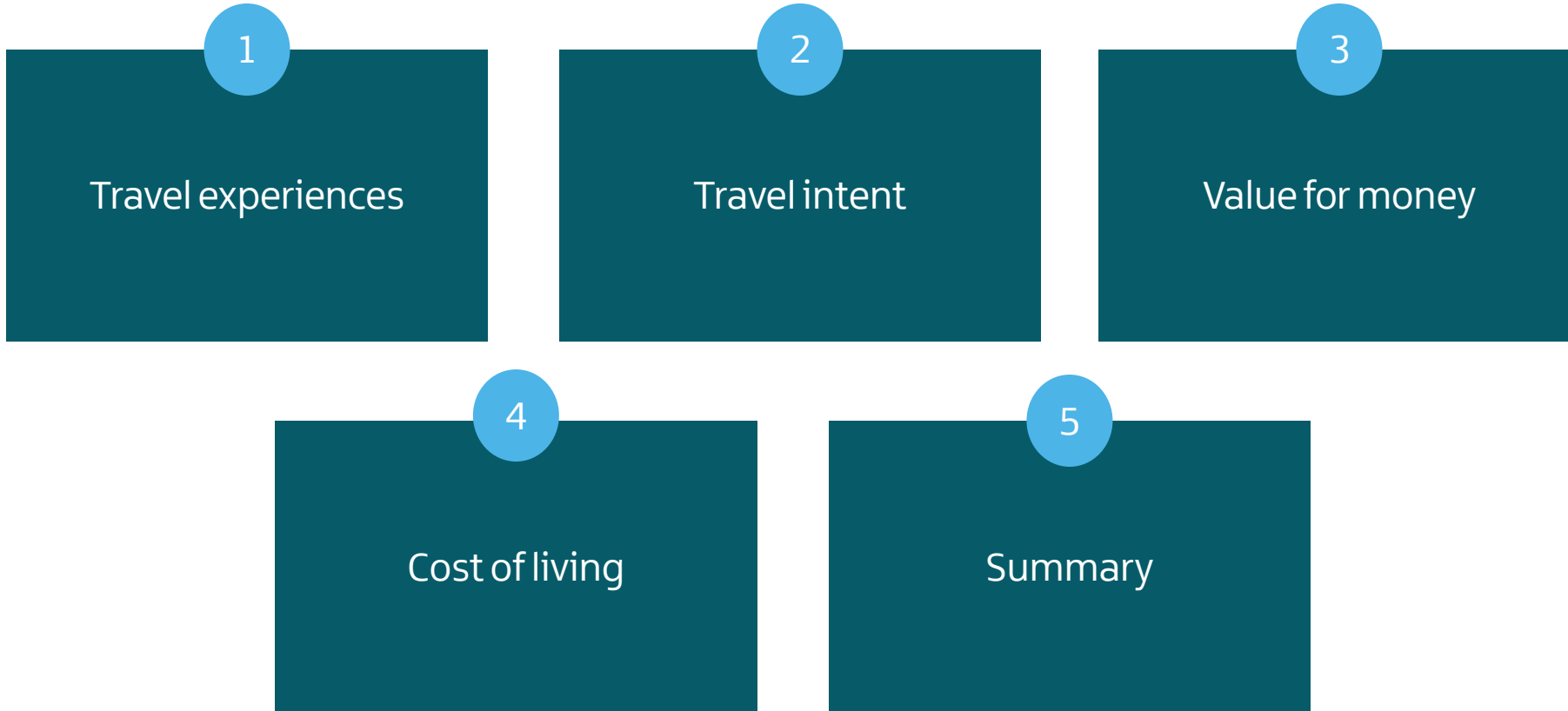
Socio-economic grade



Region



Contents





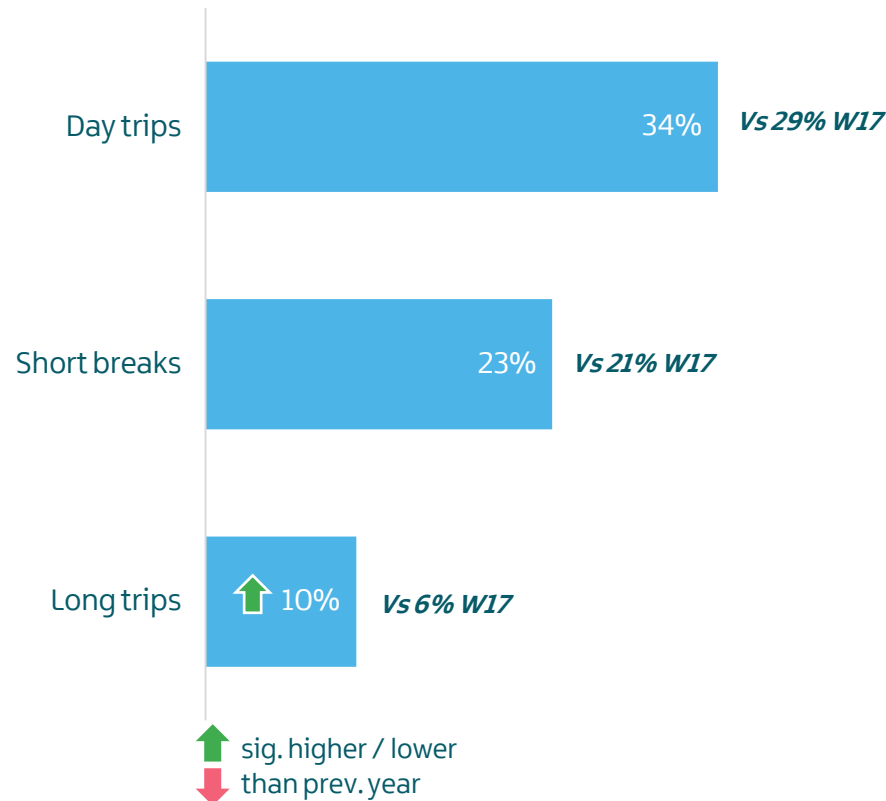
Travel experiences

Longer NI trips have increased and short breaks in NI and travel abroad have remained stable

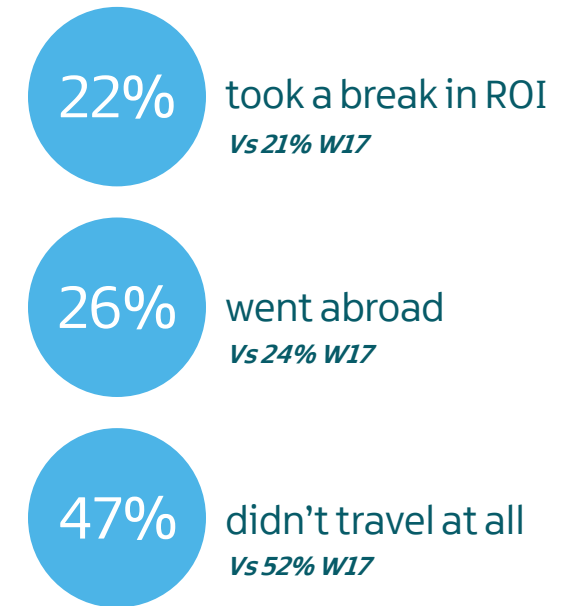
26%
Vs 22% W17*
have taken a **short or long break in NI** in 2026

*Wave 17 was conducted between 17th March and 9th April 2025

% of total sample who took a trip in NI



Other than NI...

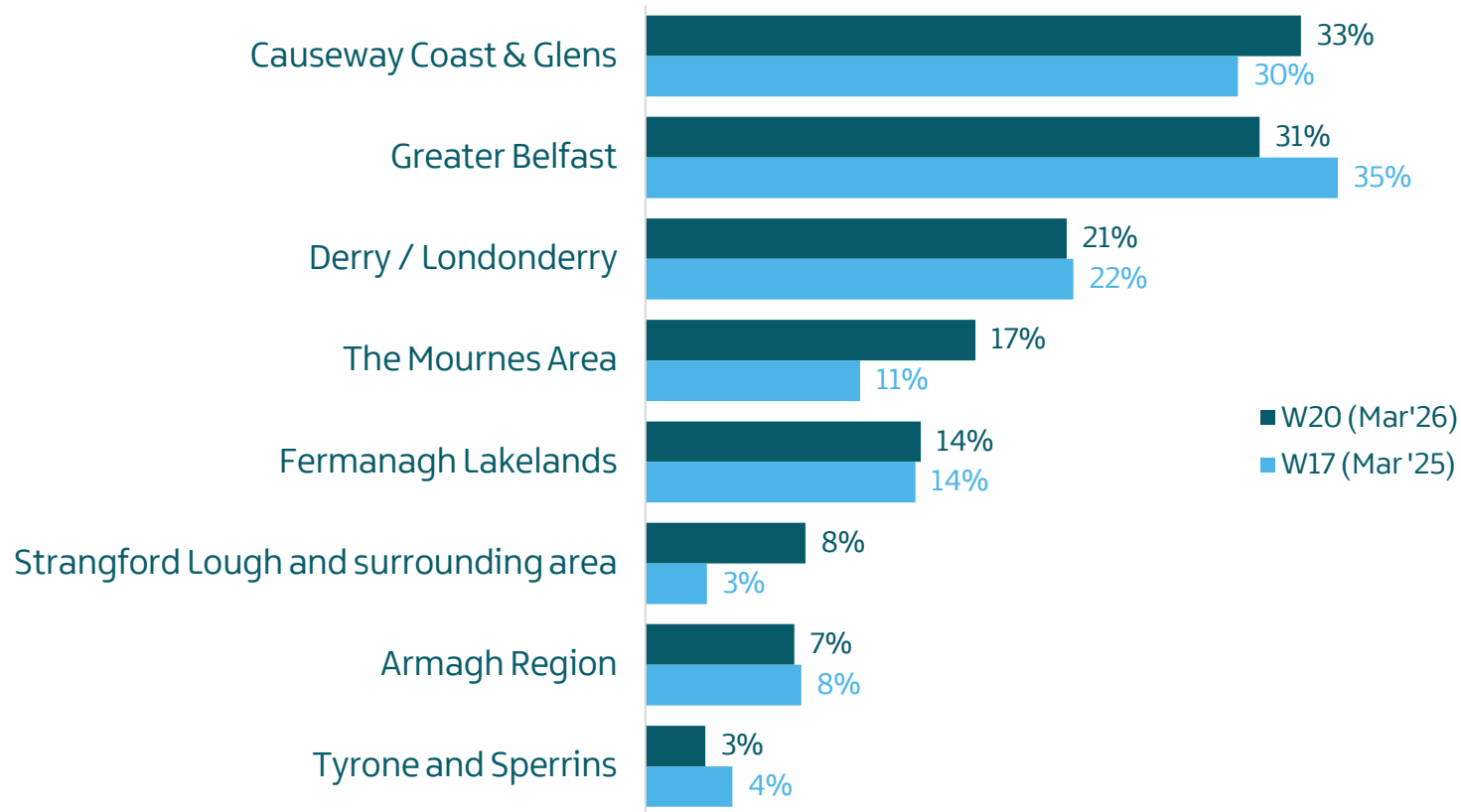


N = 400



Causeway Coast & Glens overtakes Greater Belfast, while more travel to The Mourne Area

Where they visited in NI in 2026



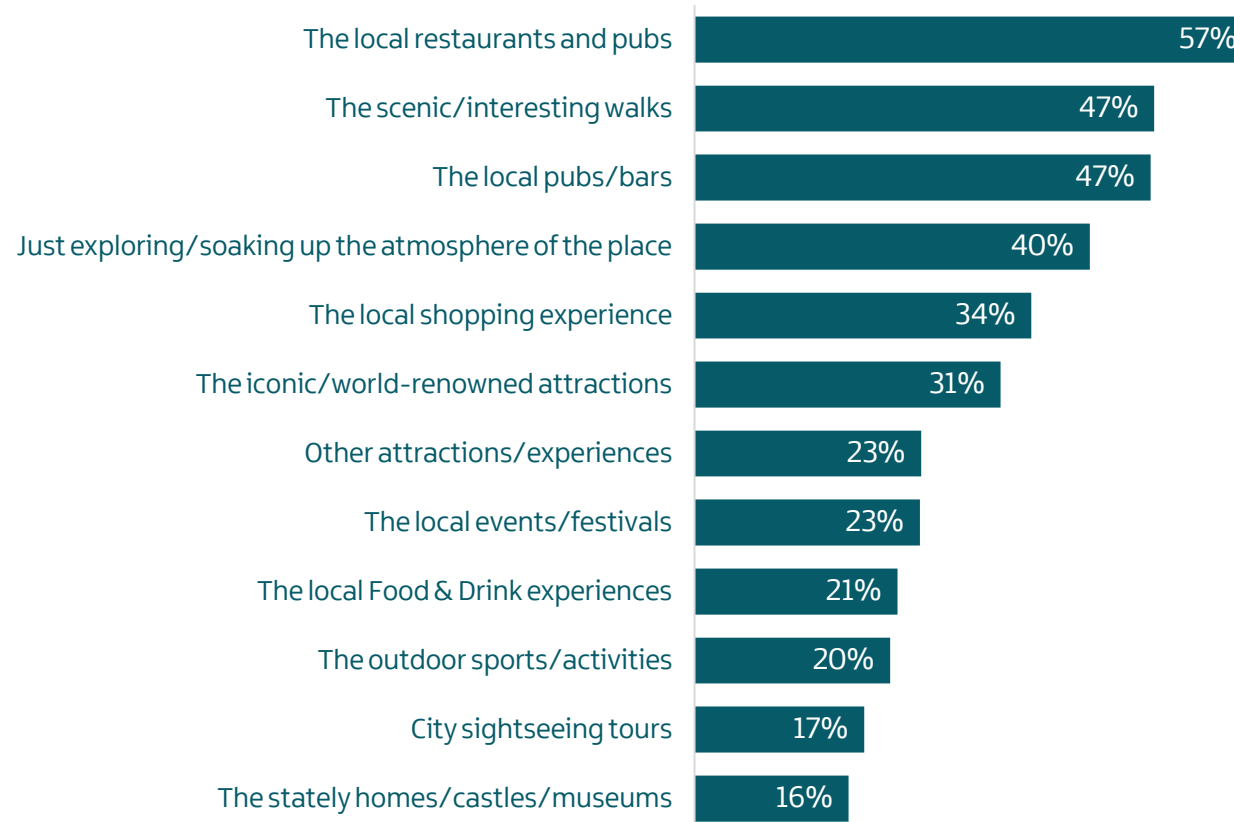
N = 170 who took any break in NI in 2026

D4BNEW. Which of the following regions in Northern Ireland did you go to on your most recent trip?



Local restaurants and pubs remain the top activity participated in, followed by scenic walks

What they visited / experienced on NI short & long trips in 2026



N = 104 who took a short or long break in NI since 2026



D6. Which of the following did you visit / experience on your recent holiday or short break in Northern Ireland?

Experience quality remains a key strength for NI, even as cost perceptions come under pressure

% saying activities were good or excellent (of those who did them)



N between 30 and 97 (depending on which activities were undertaken) – NB: low base for some activities



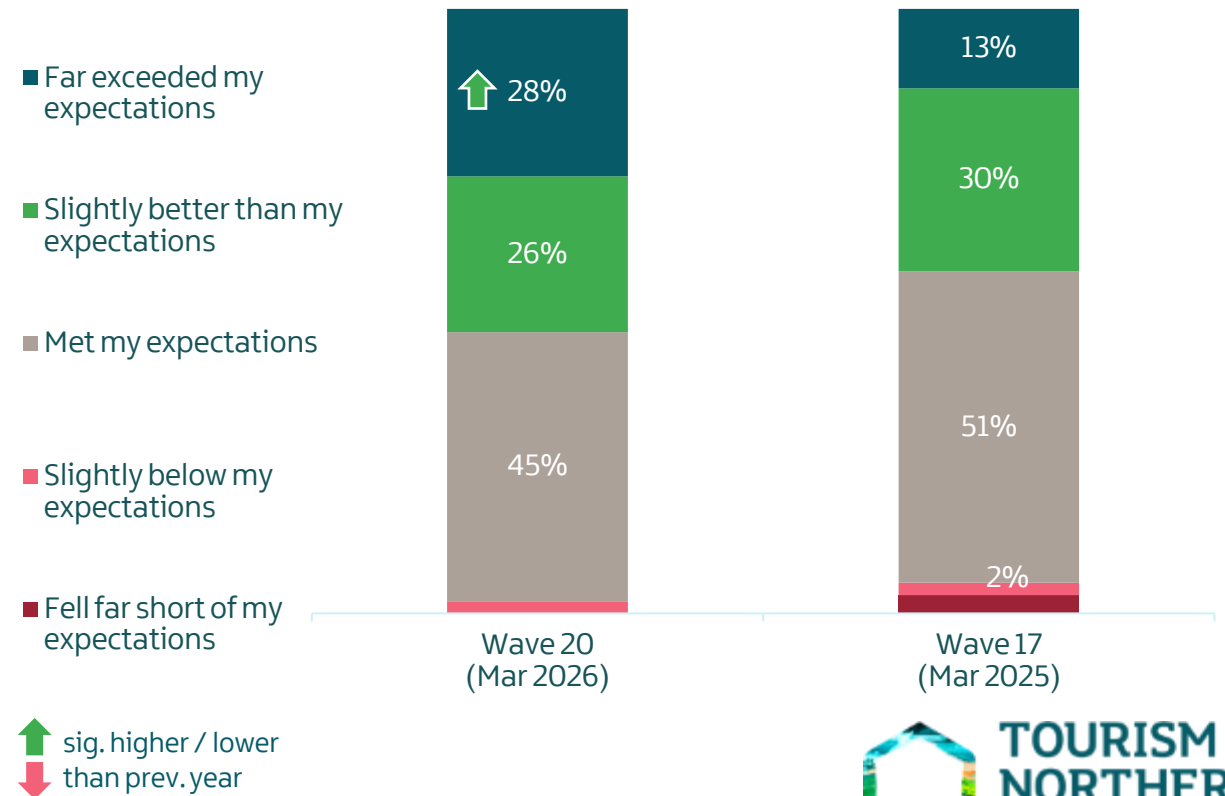
D9. And how would you rate the following aspects of your most recent trip in Northern Ireland?

Trips to Northern Ireland are increasingly far exceeding visitor expectations for domestic consumers

98%
had their expectations met or exceeded

Vs 95% in Wave 17 (Mar '25)

Those who visited NI felt their trip...



N = 104 took a short or long break in NI in 2026



D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations?

Experience quality is a clear strength, led by nature, food & drink, and service

Based on your recent trip(s) in NI, how would you rate the following...

■ Good ■ Neutral ■ Poor ■ Don't know



N = 170 (Took any break in NI in 2026)



D8a. Thinking about your recent trip(s) in Northern Ireland, how would you rate the following aspects?

A high-angle photograph of a rugged coastline. On the left, a steep, rocky cliffside descends towards a rocky beach. A wooden walkway bridge with railings spans across the beach. The ocean is a deep, vibrant blue, extending to the horizon under a clear sky. The foreground shows a grassy, rocky slope.

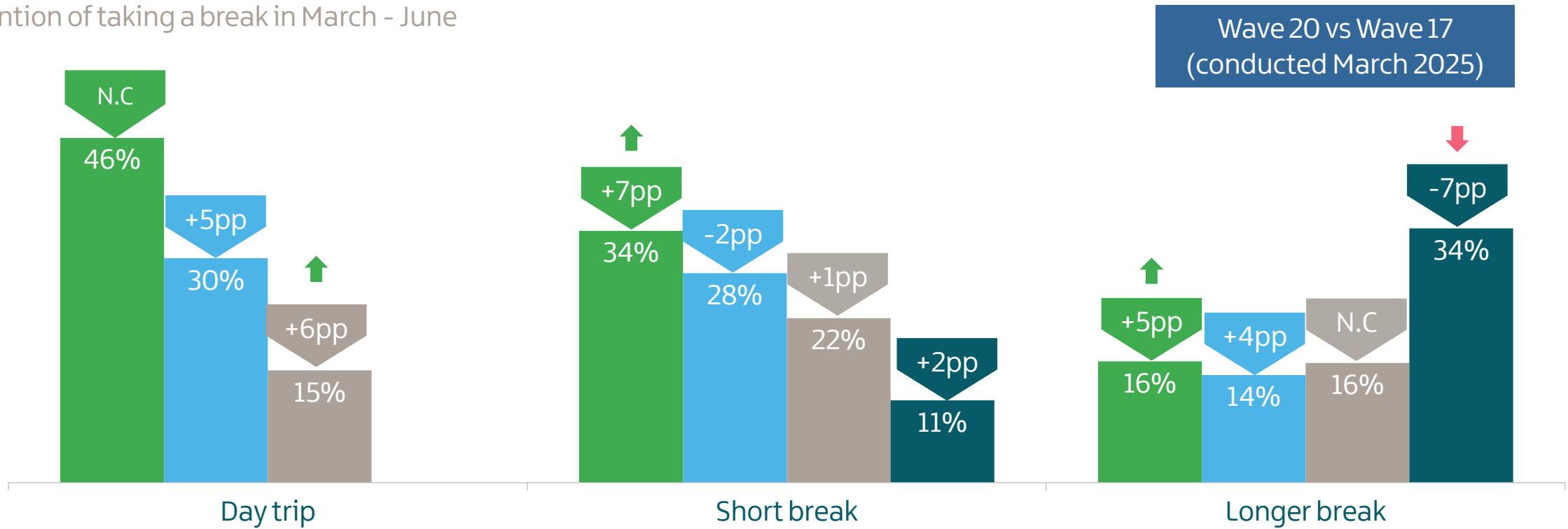
Travel intent



TOURISM
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IRELAND

Short & long break intent rises for domestic trips, while appetite for longer trips abroad declines year-on-year

Intention of taking a break in March - June



↑ sig. higher / lower than prev. year
↓

■ Northern Ireland

■ Republic of Ireland

■ Britain

■ Abroad

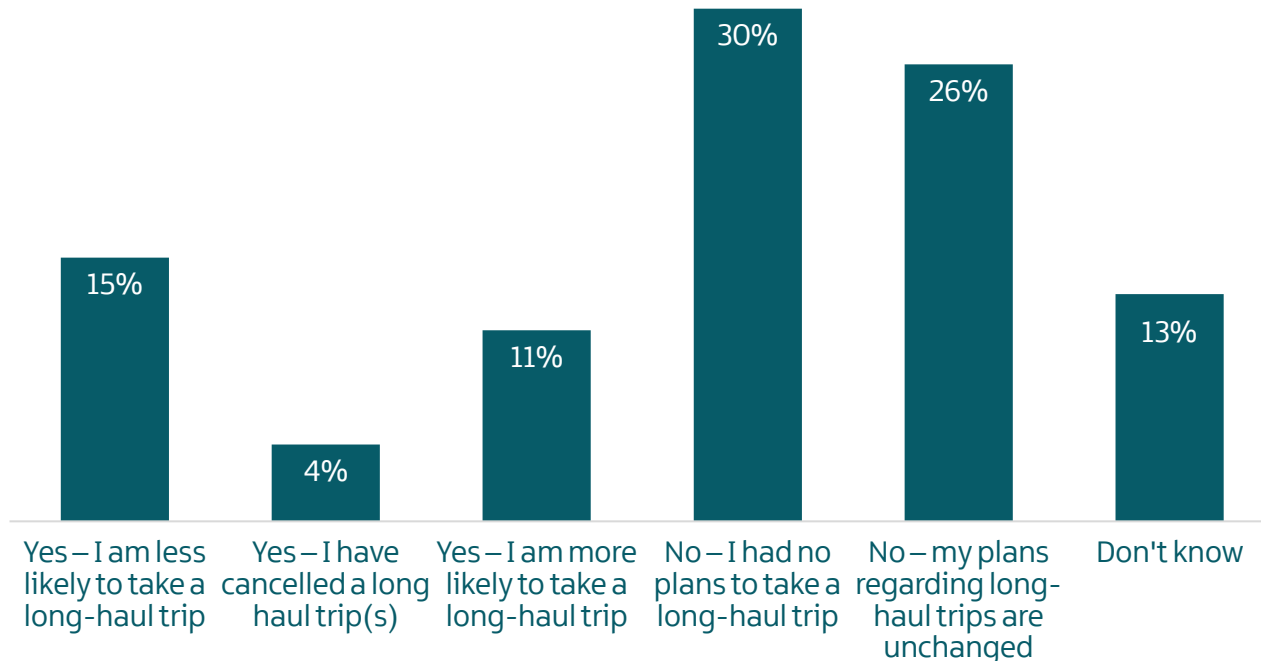
Base = 400



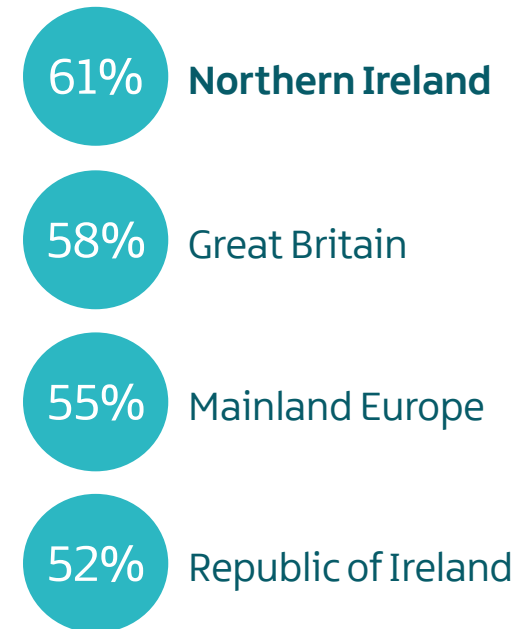
E1b. Would you consider taking a leisure day trip / short break of at least 1-3 night / longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March-June)?

There is continued appetite in some segments, but cancelled or reduced long-haul travel means many are considering NI as an alternative

Plans regarding long-haul trips



Among those who've cancelled or are less likely to take a long-haul trip – likelihood to visit the following instead



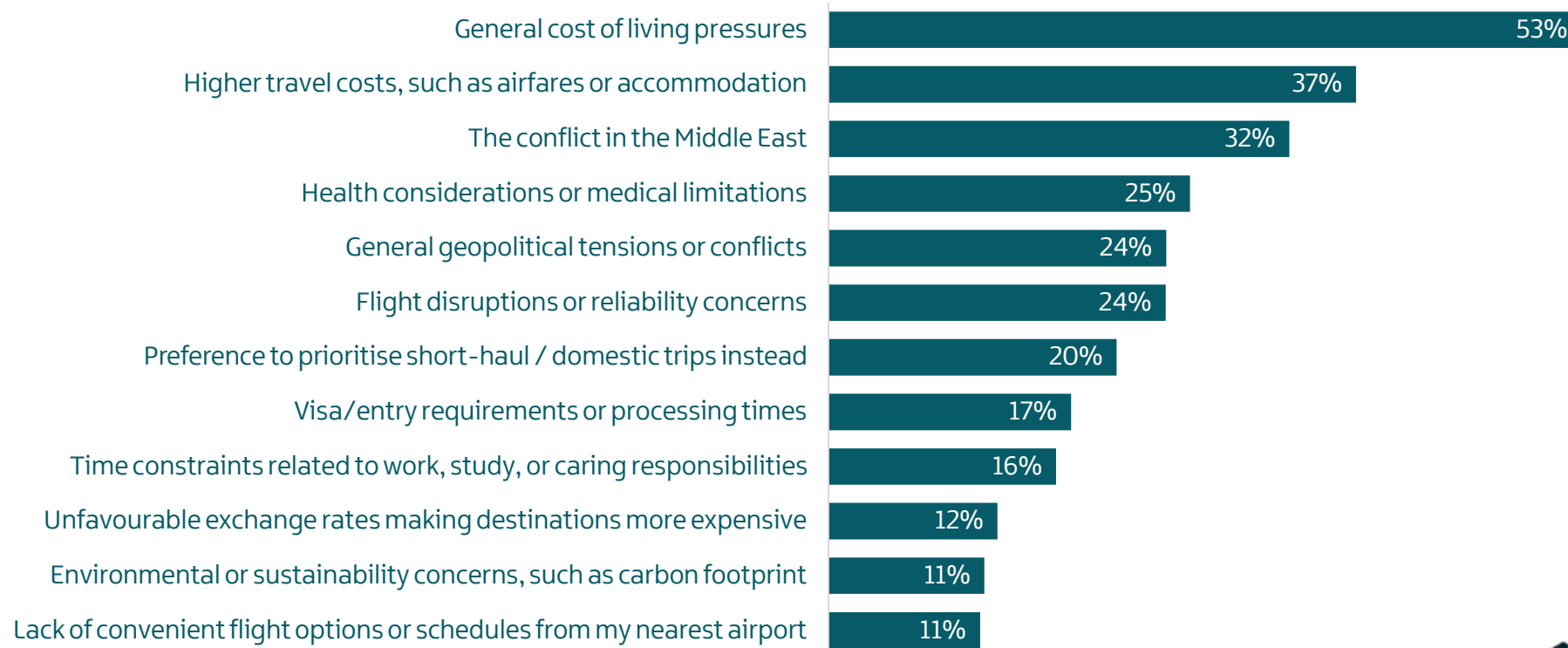
Base = 400 / 79 less likely to take or cancelled a long-haul trip

Q17. Thinking about the next 6 months, are your plans regarding taking long-haul trips (outside of the UK, Ireland, or Europe) likely to change? Q19 As you cancelled a long haul trip or plan to take fewer long-haul trips, how likely are you to visit any of the following destinations instead



Cost pressures and the Middle East conflict are the primary drivers behind reduced or cancelled long-haul travel

Reasons for cancelling/being less likely to take a long-haul trip

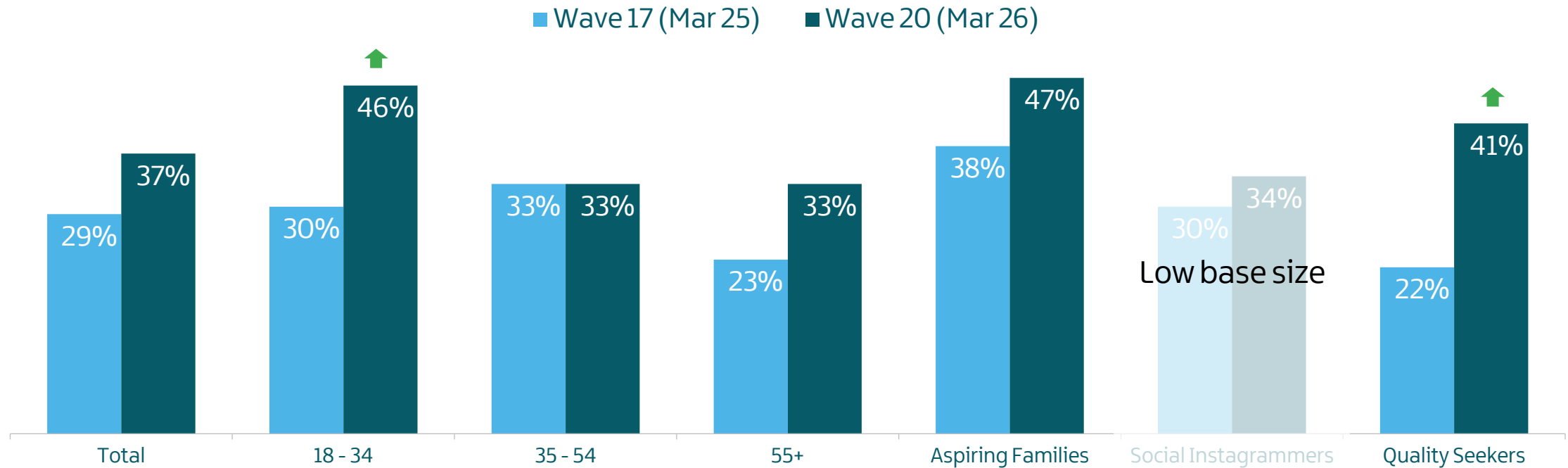


Base = 79 less likely to take / cancelled a long-haul trip

Q18. What are the main reasons you cancelled a long-haul trip or expect to take fewer long-haul trips than planned in the next 6 months? (Select all that apply)

NI break intent has increased considerably among 18-34s and Quality Seekers

Intentions of taking a break in NI in the coming months – Short and Long trips combined



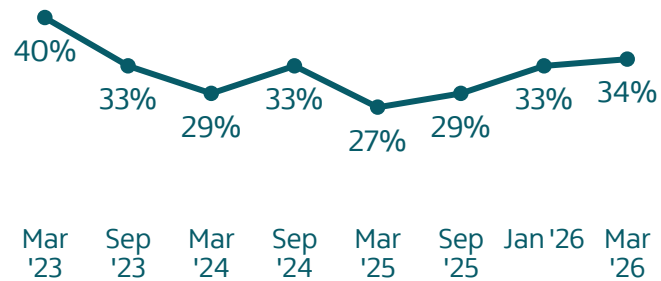
↑ sig. higher / lower
↓ than prev. year



E1b/c/d. Would you consider taking a leisure day trip / short break of at least 1-3 night / longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March to June)?

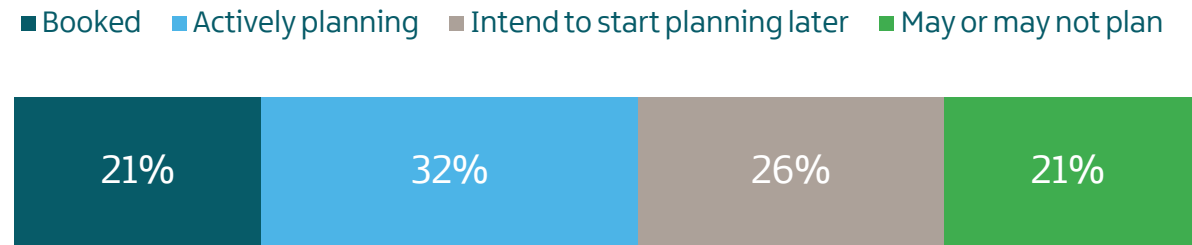
While appetite to take a short break remains high, many have yet to firm up plans

34%
are considering a short break in NI in March-June



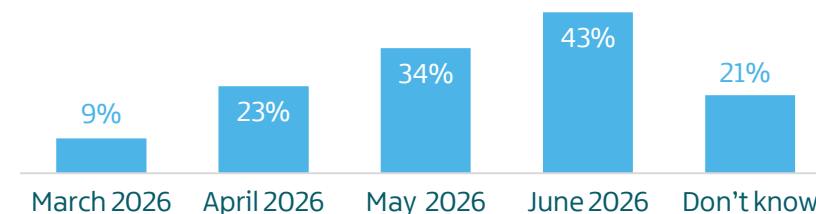
Base = 400 / 135 considering short break

Status of short break – have they booked?



53% of considerers are actively planning or have booked a trip in NI – **18%** of the total sample

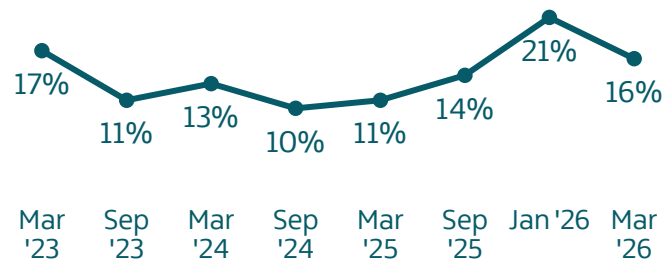
When short break is planned for:



E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March-June)? E2. Which specific month(s), if any, did you have in mind for your break(s) in Northern Ireland? E3. Have you booked or thought about planning this trip in Northern Ireland?

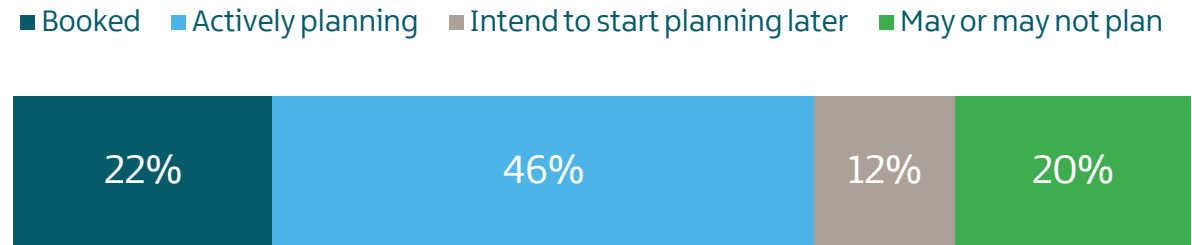
While fewer consider long breaks, those who do are likely to have started planning or booking

16%
are considering a long break in NI in March-June



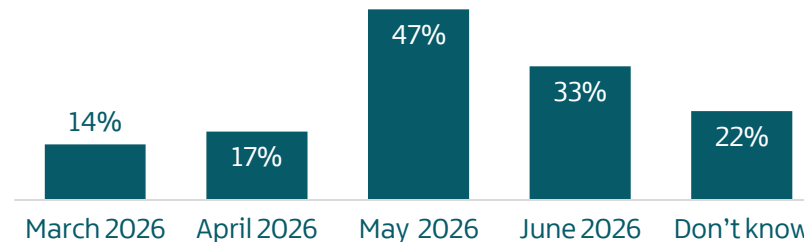
Base = 400 / 65 considering long break

Status of long break – have they booked?



68% of considerers are actively planning or have booked a trip in NI – **11%** of the total sample

When long break is planned for:

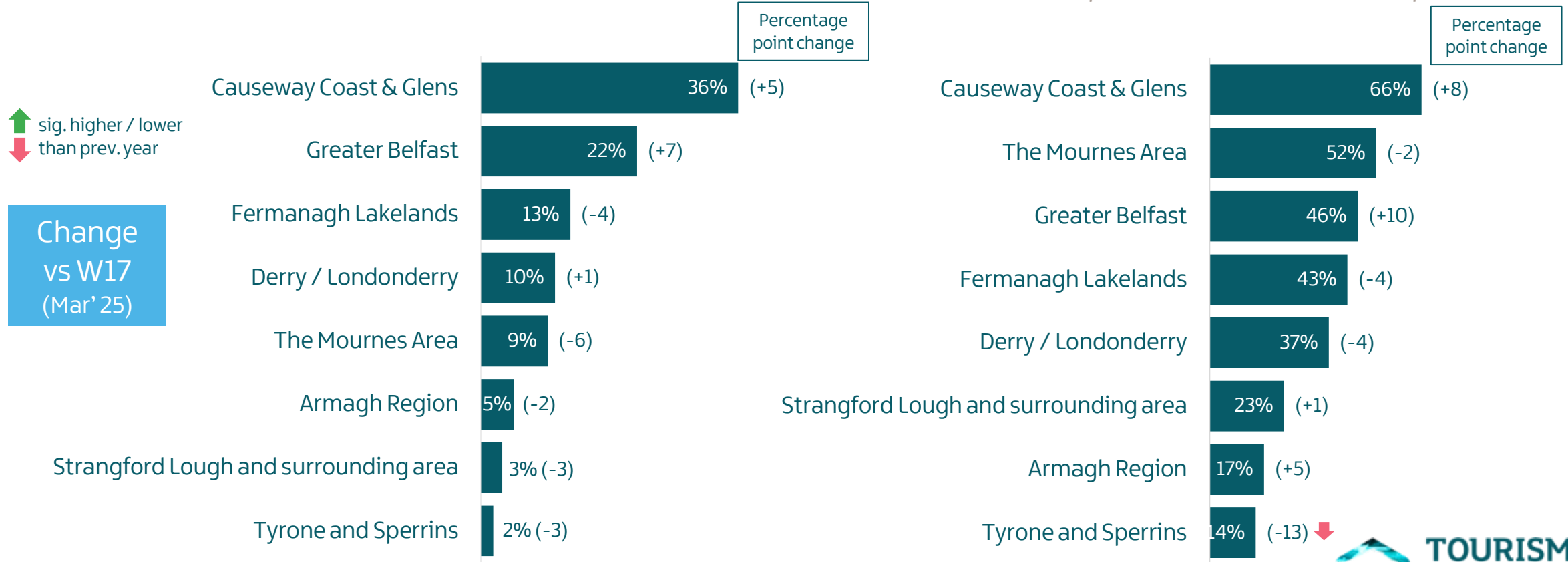


E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March to June)? E3. Have you booked or thought about planning this trip in Northern Ireland?

Causeway Coast & Glens remains NI's strongest draw for local travellers

Destinations selected as no. 1 consideration for next trip

Destinations in top 3 consideration for next trip



Base = 148 planning long or short break

E1fNEW. And which of the following regions are you likely to consider visiting for your next trip in Northern Ireland?



Relaxation remains important, but staying in quality accommodation is rising in appeal

Trip motivations (long and short combined) – top 7



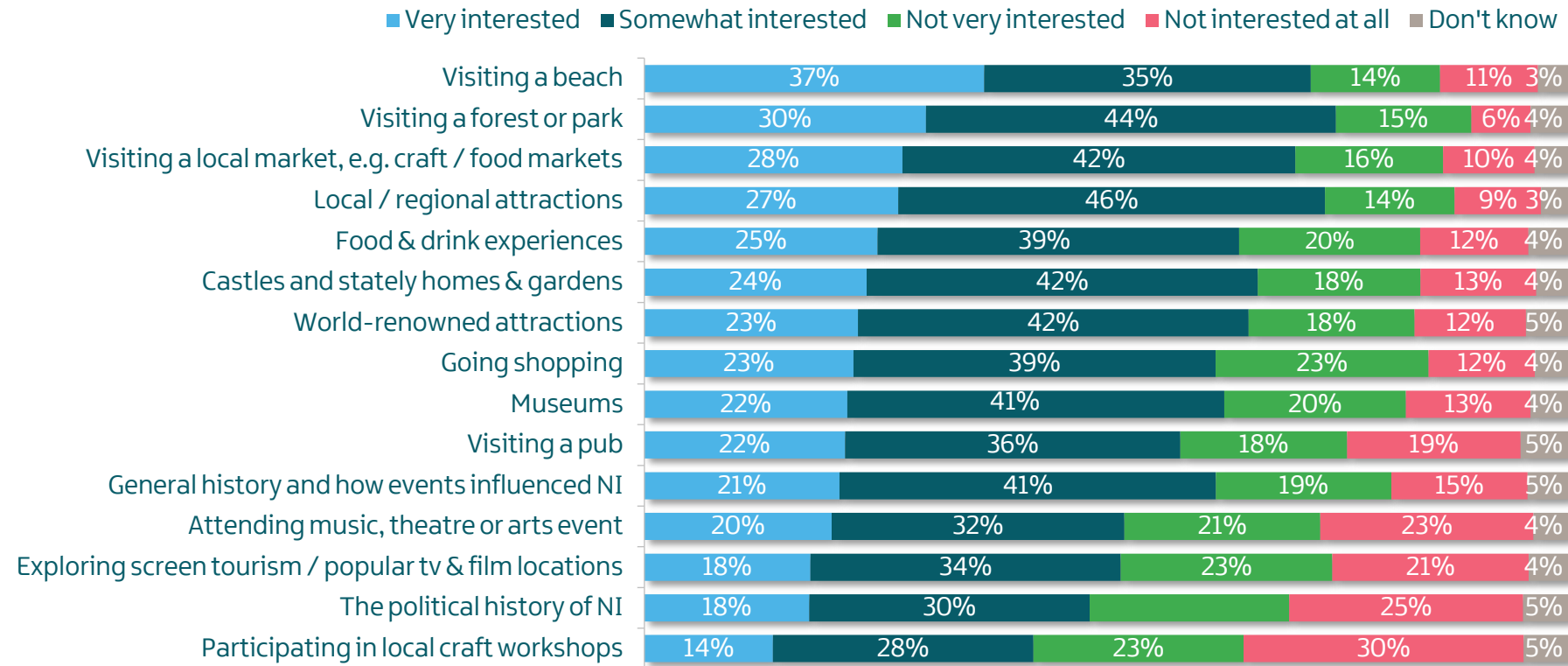
Base = 117 planning long or short break (excl. “may or may not plan”)

E4a. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the trip?



Beaches, nature and local experiences generate the strongest interest

Interest in NI experiences



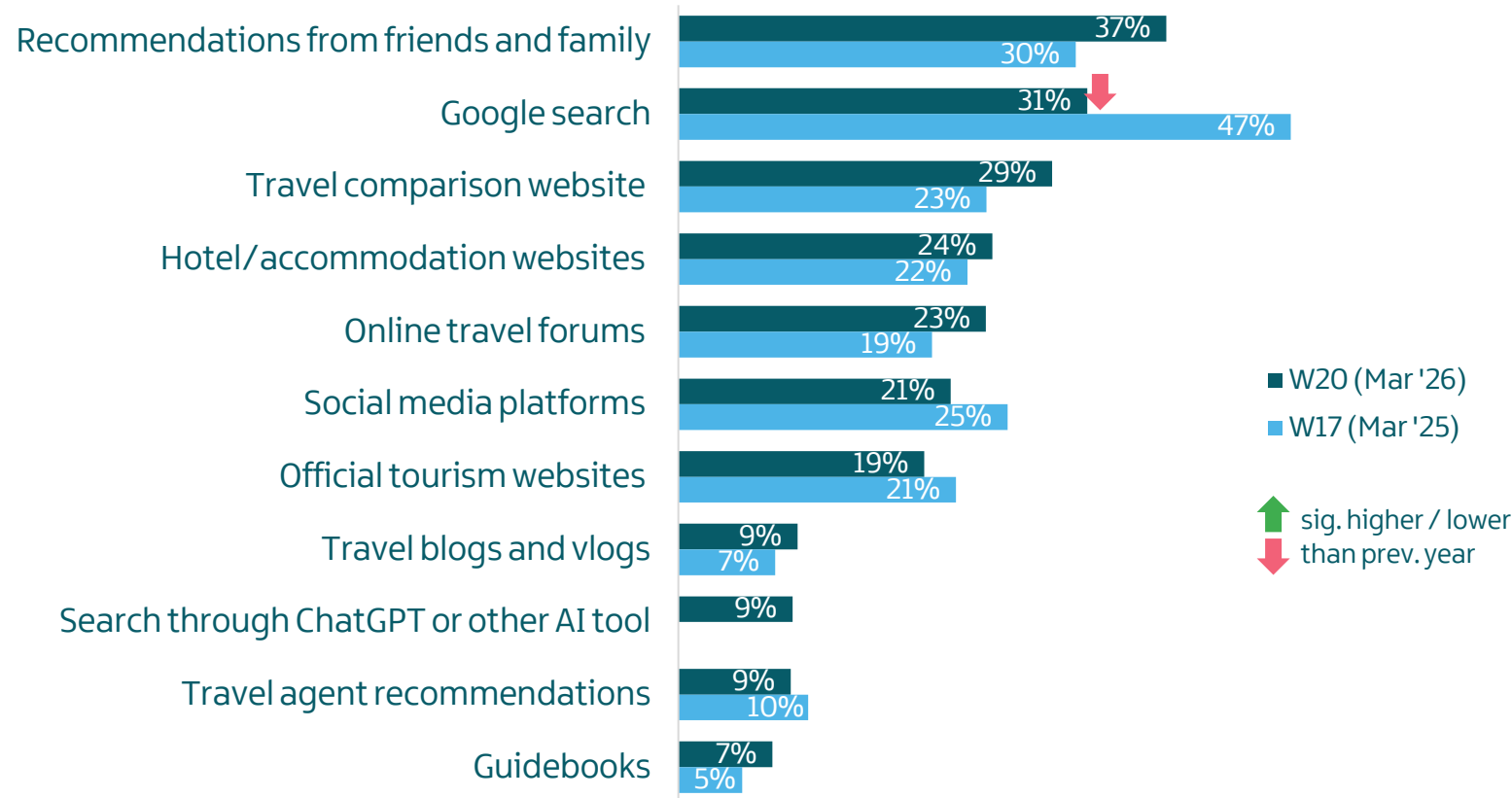
Base = 400



N13. If on a short break/holiday in NI, which of these would you be most interested in visiting or finding out more about?

Reliance on Google search is declining, with word of mouth now the most influential research source

How they plan to research their trip



Booking.com is the main choice of comparison site

■ W20 (Mar '26)
■ W17 (Mar '25)
↑ sig. higher / lower than prev. year
↓

Base = 121 planning long or short break (excl. “may or may not plan”) / 34 plan to use a travel comparison website for research

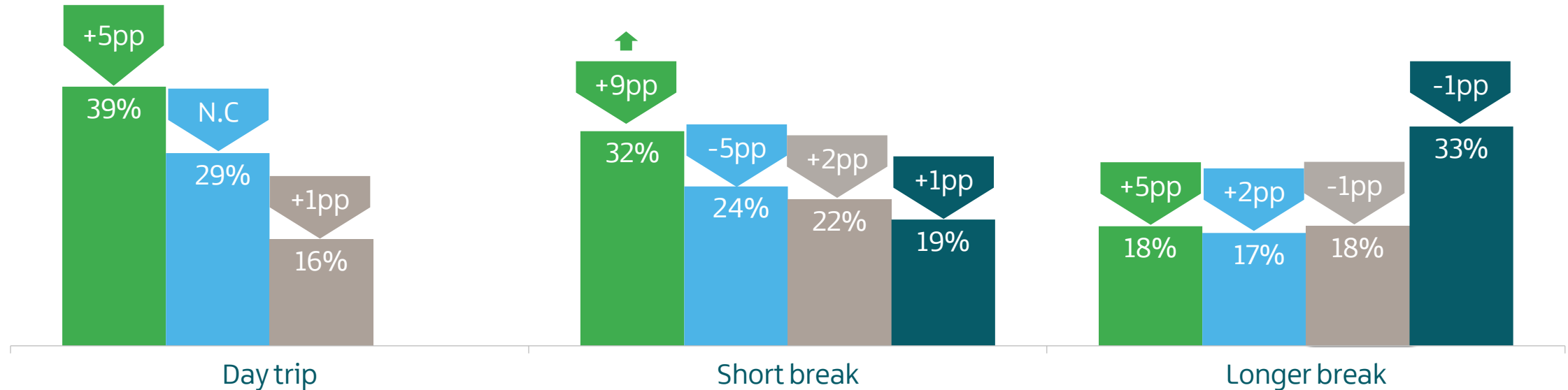
E10. And where do you plan to research accommodation, activities, travel, etc. for your upcoming trip in Northern Ireland? / E10b. You mentioned you plan to use a travel comparison website to research your upcoming trip in Northern Ireland. Which website do you plan to use?



There's been a considerable increase in NI short break intent for summer 2026

Intentions of taking a break in summer 2026

Wave 20 vs Wave 17
(conducted March 2025)



↑ sig. higher / lower
↓ than prev. year

■ Northern Ireland

■ Republic of Ireland

■ Britain

■ Abroad

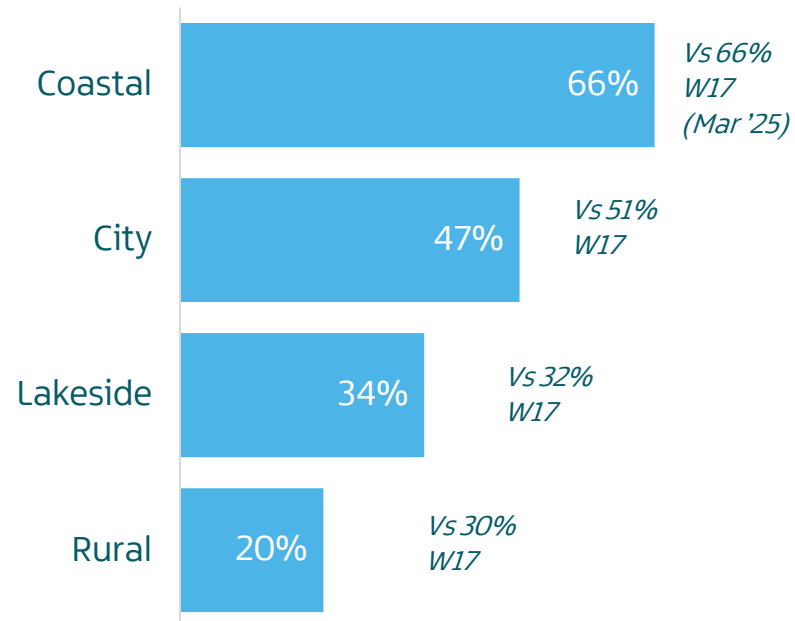
Base = 400



E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in summer 2026? E24b. Would you consider taking a short break of at least 1-3 nights in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in summer 2026? E24d. Would you consider taking a longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in summer 2026?

Coastal breaks are key for summer, while many haven't fully firmed up summer NI plans

Type of break considered



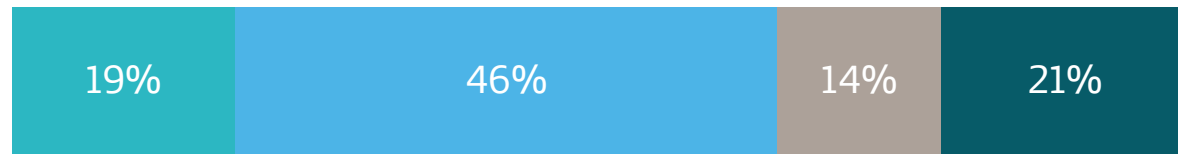
Amount of short break planned

■ Booked ■ Actively planning ■ Intend to start planning later ■ May or may not plan



Amount of long break planned

■ Booked ■ Actively planning ■ Intend to start planning later ■ May or may not plan



Base = 135 considering long or short break in summer 2026

E24c. Which of the following destination types would you consider in summer 2026? / E25 Thinking about the short/long trip(s) you said you would consider for summer 2026 in Northern Ireland, have you booked or thought about planning this short/long trip?

Most summer trips abroad are booked or actively being planned, with July-August seeing the strongest demand

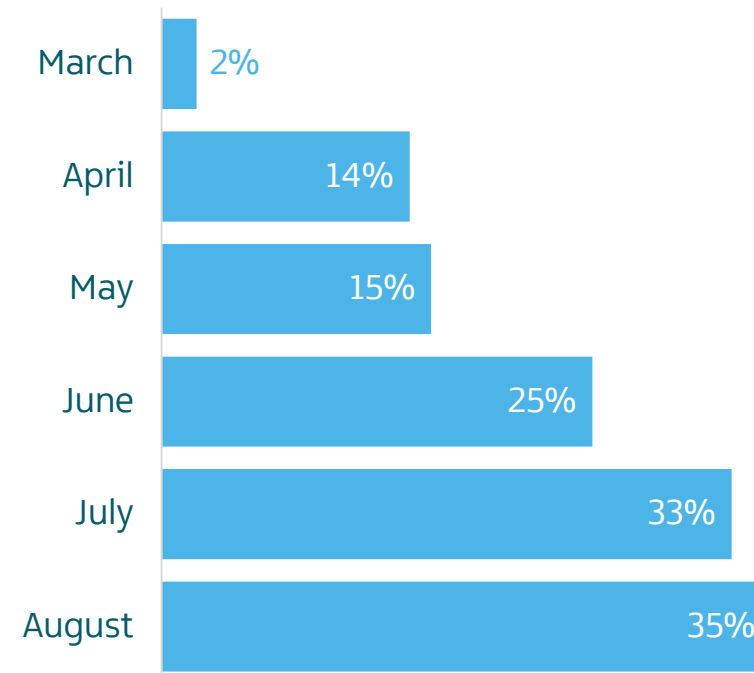
45%

of the total sample are considering a break abroad in the next 6 months
(vs. 50% W17 - conducted in March 2025)

65%

of this cohort are actively planning or have already booked their trips
(vs. 67% W17)

When trips abroad are planned for



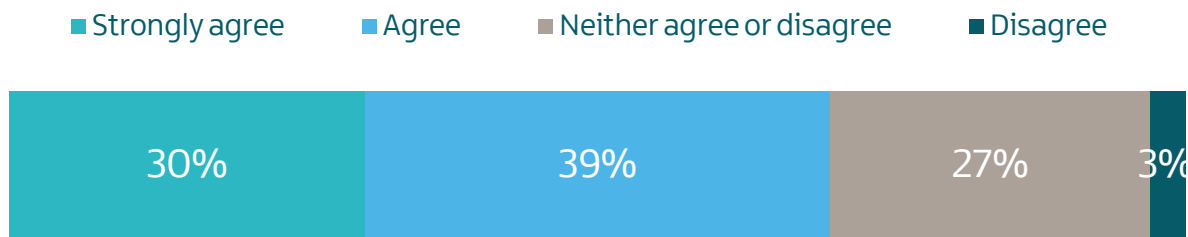
Base = 181 considering a trip abroad

E14. You mentioned that you are considering taking a break abroad in the next 6 months. Have you booked or thought about planning this trip abroad?
E14b And in which of the following months are you likely to take a holiday or short break abroad in the next 6 months?

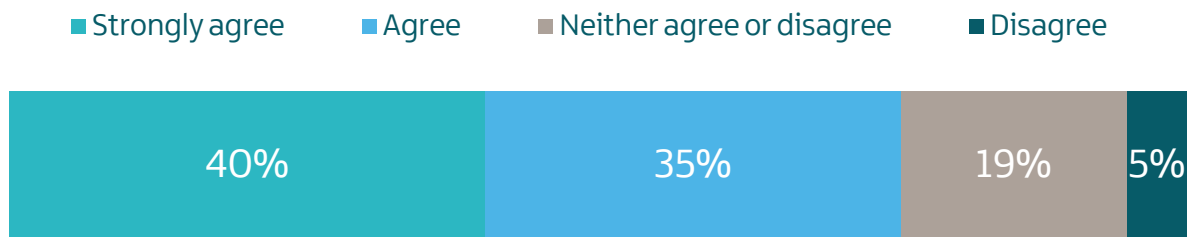
NI's dog-friendly perception is strong, with three quarters of dog owners thinking it is dog friendly

49%
Have a dog

Agreement that NI is a dog friendly destination (ALL CONSUMERS)

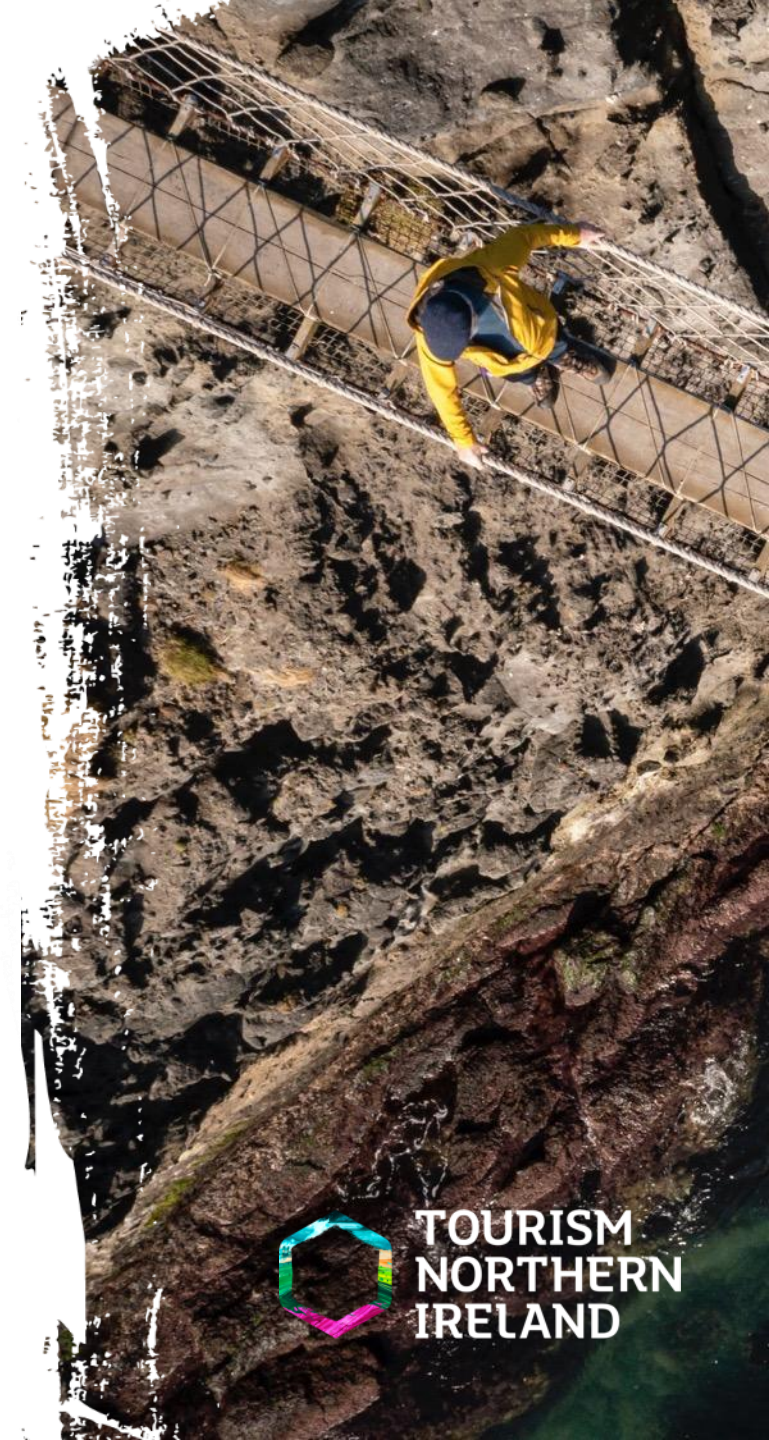


Agreement that NI is a dog friendly destination (DOG OWNERS)



Base = 400

Q11. Do you have a dog? Q12. To what extent do you agree or disagree that Northern Ireland is a dog friendly destination?





Value for money

Value for money perceptions of NI have declined, but NI is still perceived as better value than ROI and GB

Value for money perceptions

↑ sig. higher / lower
↓ than prev. wave

Poor value for money

Good value for money

Net Score

			Mar'26 (W20)	Jan'26 (W19)	Sept'25 (W18)
Spain	↑ 9%	52%	+43	+57	+44
Portugal	11%	48%	+37	+43	+34
Northern Ireland	↑ 27%	35%	+8	+37	+12
Italy	21%	29%	+8	+29	+15
Republic of Ireland	↑ 39%	25%	-14	+7	-16
France	↑ 32%	25%	-7	+23	+1
Great Britain	↑ 35%	24%	-11	+23	-10

N = 400



C1. When thinking of the following places as tourism destinations, to what extent do they offer value for money?

Meals out, accommodation and petrol show the sharpest drop in value for money perceptions

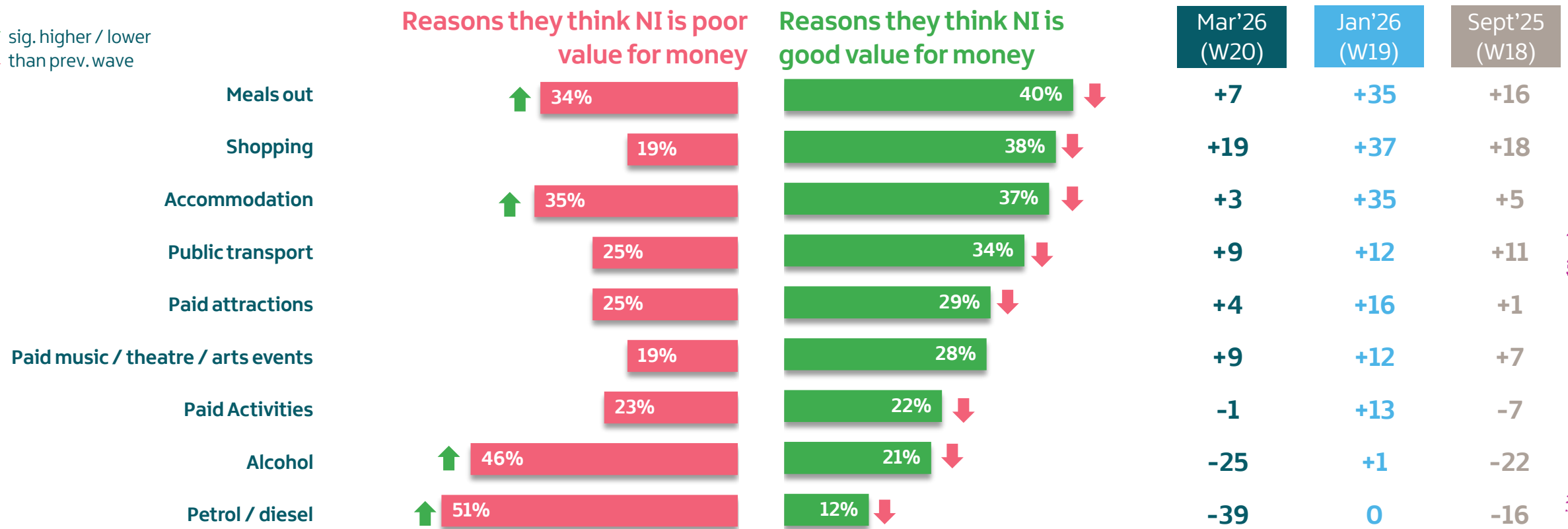
Reasons for thinking NI is poor or good value for money as a holiday or short break destination

↑ sig. higher / lower
↓ than prev. wave

Reasons they think NI is poor value for money

Reasons they think NI is good value for money

Net score



N = 400

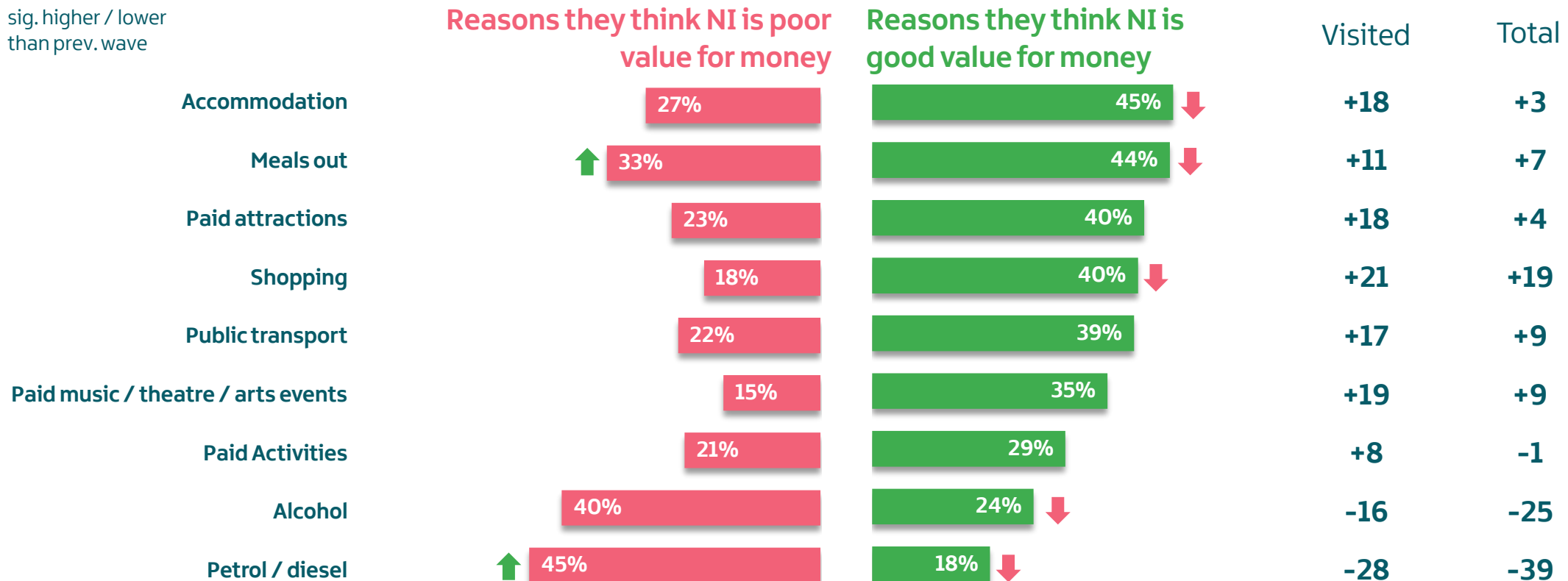


C3. Which of the following do you think represent poor / good value for money when it comes to Northern Ireland as a short break or holiday destination?

Value for money perceptions remain stronger among those who visited NI

Reasons for thinking NI is poor or good value for money as a holiday or short break destination

↑ sig. higher / lower
↓ than prev. wave



Total N = 400, Those who took a trip in NI = 170



C3. Which of the following do you think represent poor / good value for money when it comes to Northern Ireland as a short break or holiday destination?



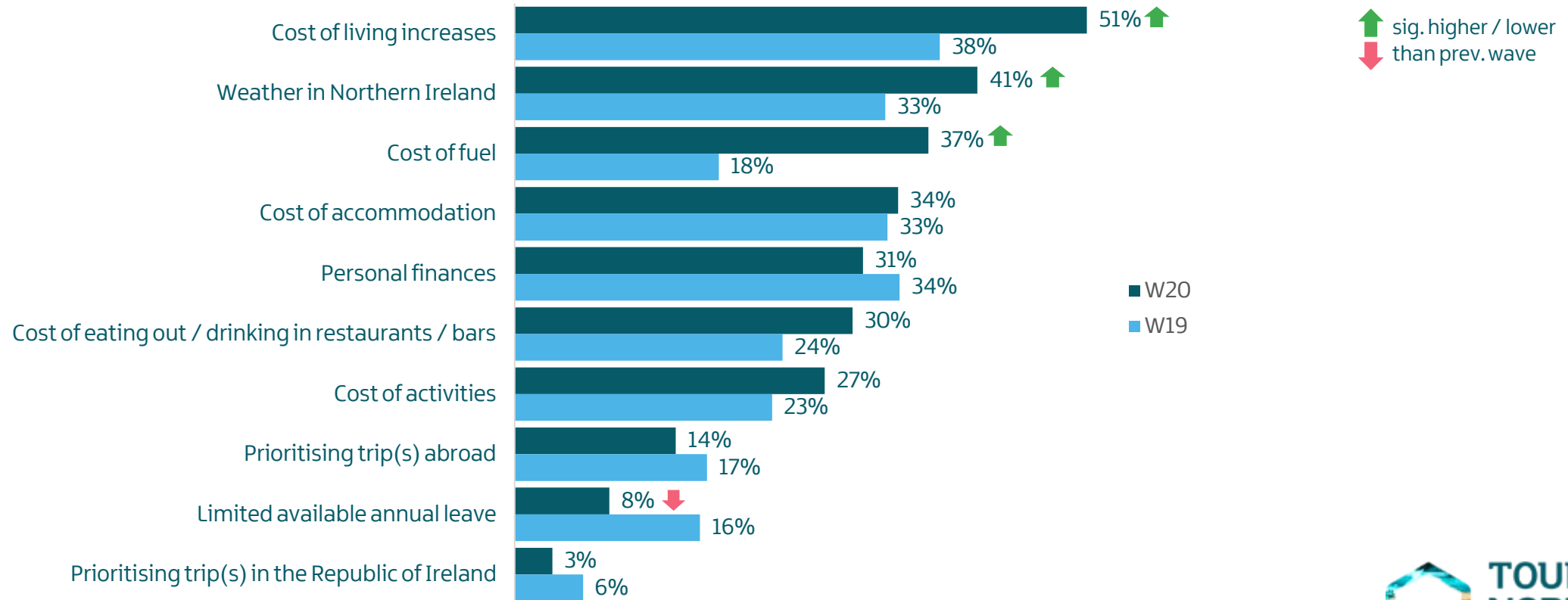
Cost of living



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Cost pressures are increasingly shaping decisions about NI breaks, with concerns about fuel costs doubling

What could stop them taking a break in NI



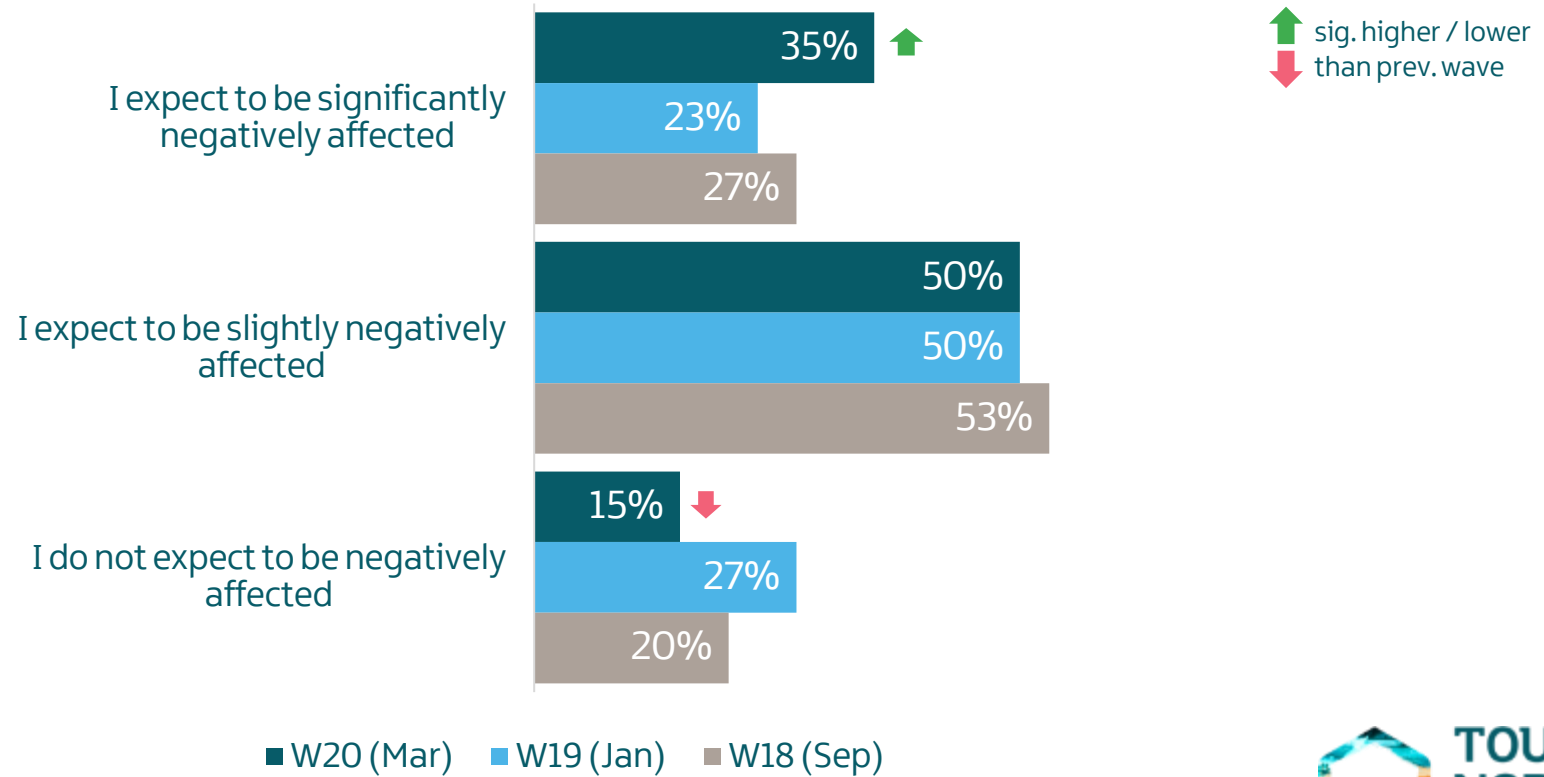
N = 400

FO. Which, if any, of the following factors do you see as potential barriers to you taking a short break or holiday in Northern Ireland in the next six months?

Cost-of-living pressures are intensifying, with the vast majority expecting to be negatively impacted

Extent to which people feel they will be financially affected by cost-of-living increases in coming months

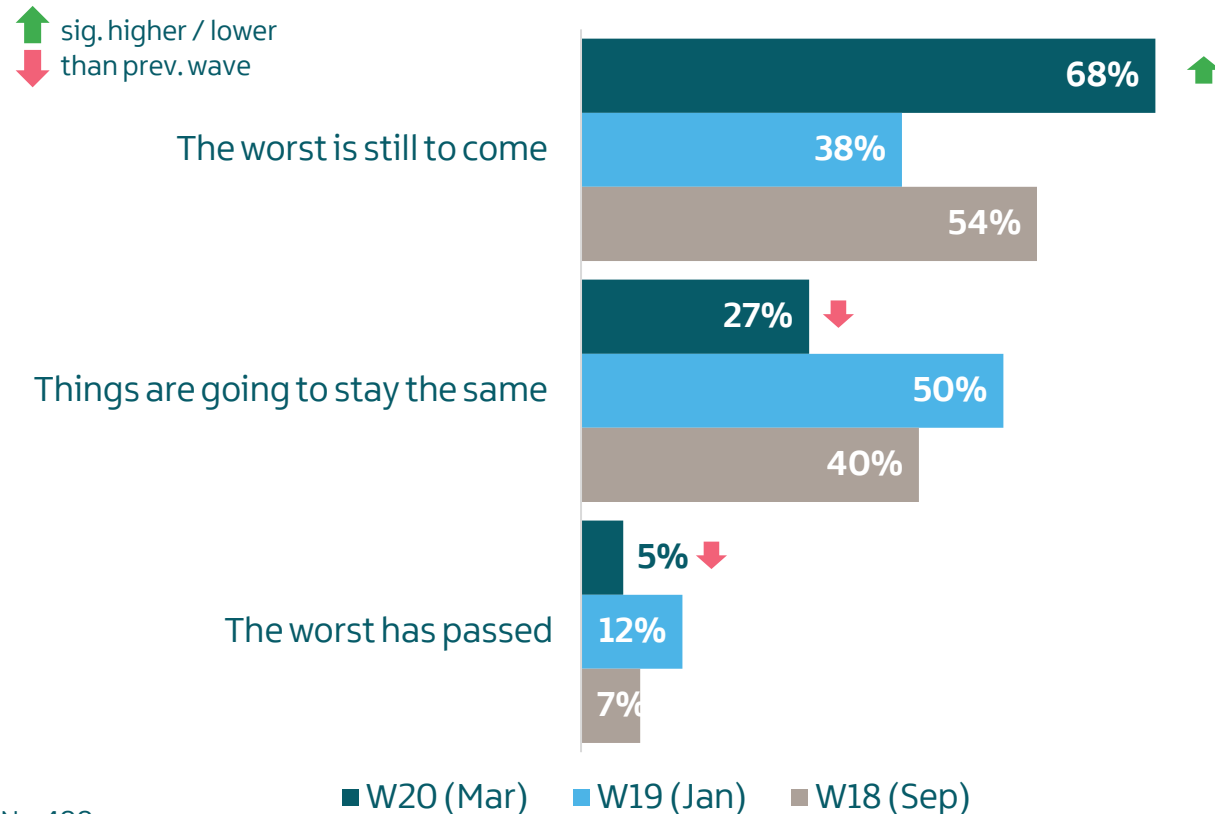
85%
expect to be affected by cost-of-living increases



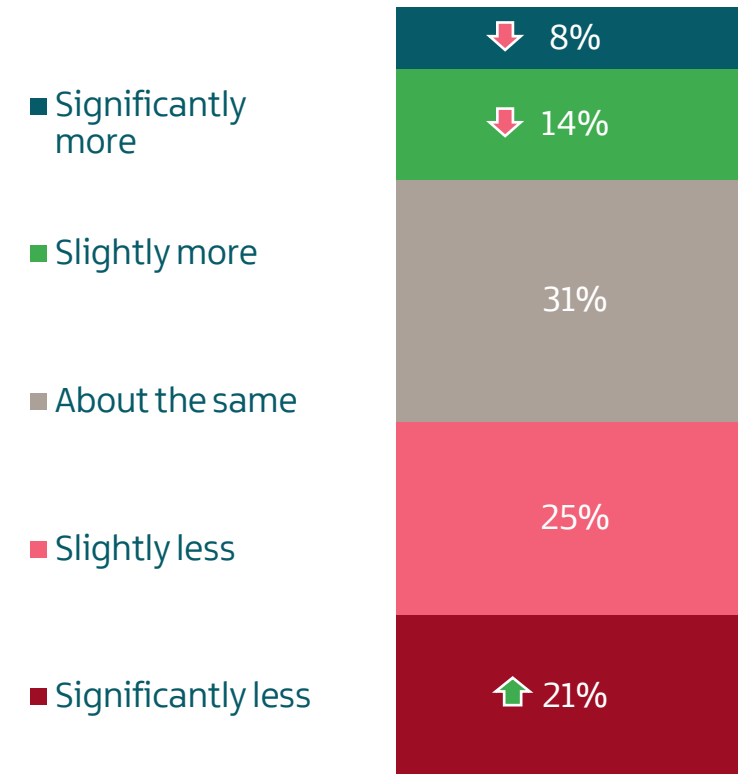
N = 400

People increasingly feel the worst may be ahead, and have less disposable income to spend on activities/holidays

How the cost-of-living situation will change in next few months



How disposable income to spend on activities/holidays has changed

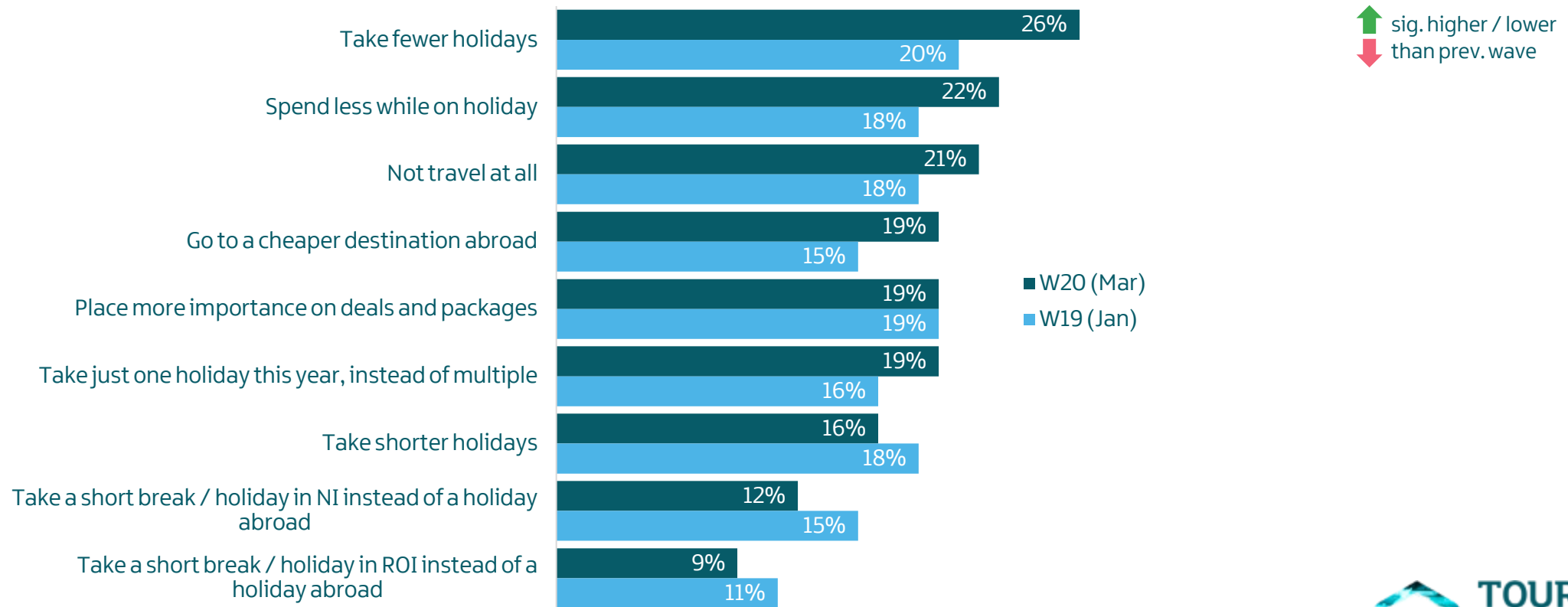


N = 400

F2. Over the coming few months, how do you think the cost-of-living crisis is going to change in Northern Ireland? / F2b. Compared to this time last year, how much has the amount of money you have left at the end of the week/month to spend on leisure activities like dining out, entertainment, or HOLIDAYS / SHORT BREAKS changed?

As budgets tighten, people are adapting their holiday plans rather than opting out entirely

Things people are more likely to do in relation to short breaks/holidays compared to this time last year



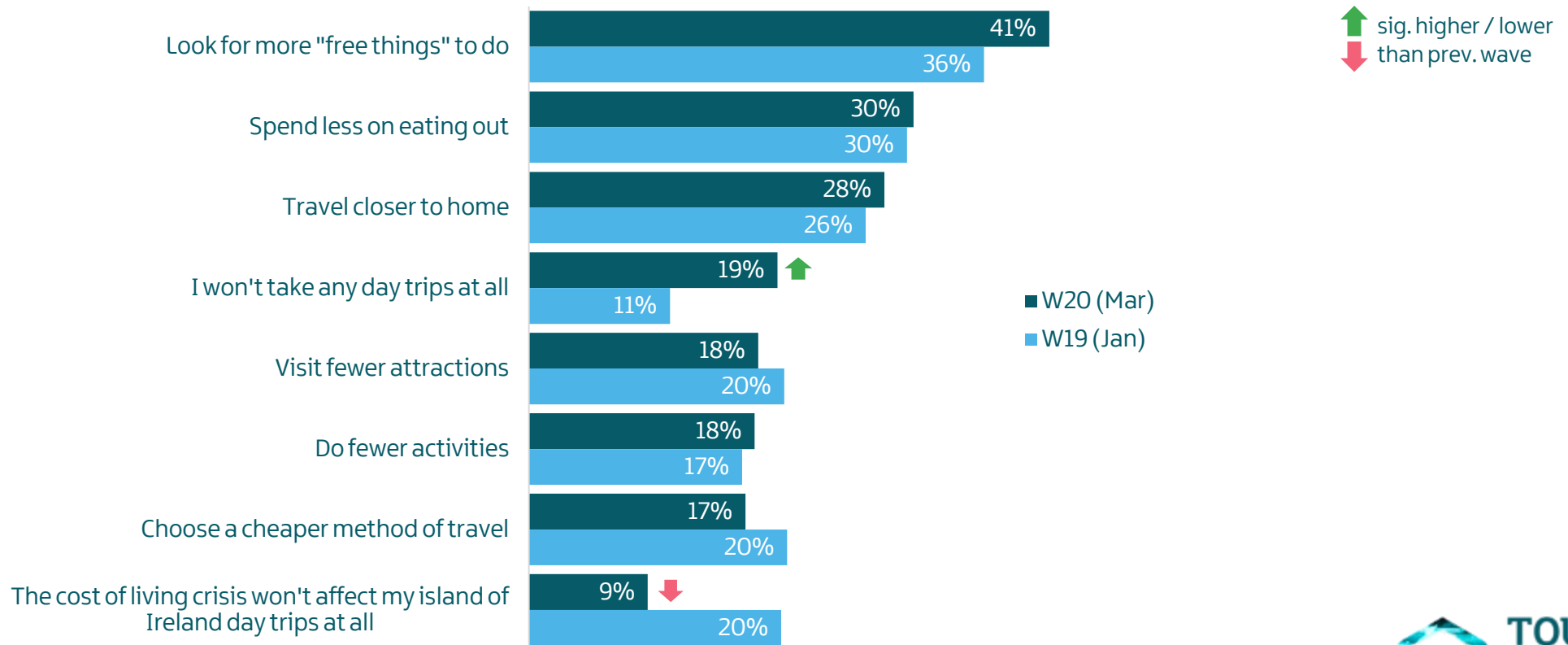
N = 400



F6. Compared to this time last year, which, if any, of the following are you more likely to do in relation to holidays and short breaks?

Day trips are increasingly seen as an easy place to cut spend

Things people consider doing because of the cost-of-living crisis when taking a day trip in NI



N = 400



F7. Which of the following would you consider doing as a result of increases in cost of living if planning a day trip in Northern Ireland in the next few months?



Summary



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Key takeaways

Visitation and experience remain stable year-on-year

Northern Ireland domestic trips have remained stable, and those who visited continue to report positive experiences. Satisfaction levels are high and broadly unchanged year-on-year.

NI travel intentions are positive

Among NI residents, intentions to take both short and long domestic breaks over the coming months have increased slightly, while day trip intentions remain stable. Intention to travel abroad over the coming months has declined compared with this time last year. Looking ahead to summer, NI domestic trip intent is strengthening.

Value for money perceptions have weakened since last wave, but improve significantly after visiting

NI continues to be rated better value for money than ROI and GB, but perceptions of NI as a value-for-money destination have softened since the last wave as cost pressures rise and travellers become more sensitive to everyday spend. By contrast, recent visitors report notably stronger value perceptions. Similar declines are also visible across international markets.

Cost of living concerns have intensified, but current economic and geopolitical situation brings opportunities and threats for NI tourism

Concern about cost of living has increased since the previous wave, with more consumers expecting to be financially affected. Around one in five NI consumers have cancelled or reduced long-haul travel plans for the coming six months. Financial pressure remains the primary driver, while one in three also cite the Middle East conflict. Consumers reconsidering long-haul flights are increasingly pivoting towards closer destinations, with over 6 in 10 NI consumers more likely to holiday within NI.