

Tourism Northern Ireland Consumer Sentiment Research

ROI Market – Wave 20

Research conducted March/April 2026



TOURISM
NORTHERN
IRELAND



Research background

Research background & objectives

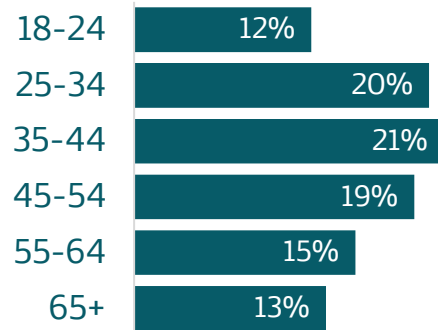
This is the 20th wave of our consumer sentiment research in the Republic of Ireland market. We have continued to look at consumer attitudes towards travel in NI and elsewhere, monitoring changes throughout 2026.

Objectives:

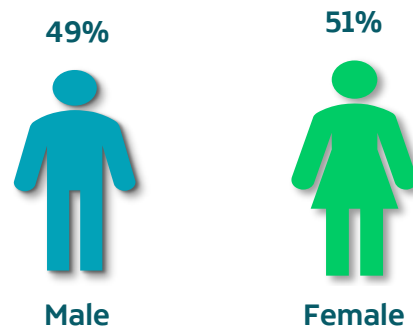
- Understand recent travel experiences in NI.
- Assess current attitudes towards travel in NI, ROI and further afield.
- Understand what impact cost of living increases and other broader factors including geopolitics are having on the above.

We spoke to a robust, nationally representative sample in the Republic of Ireland

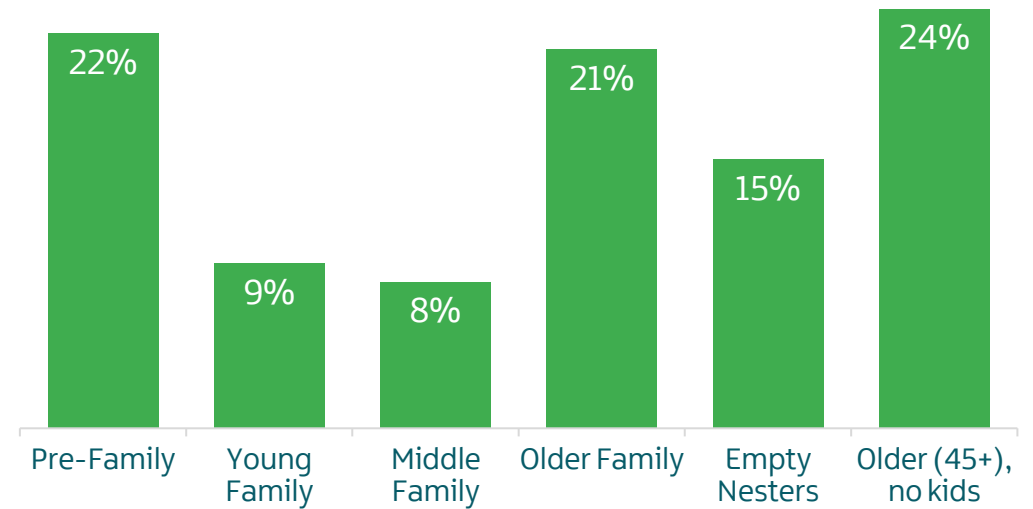
Age



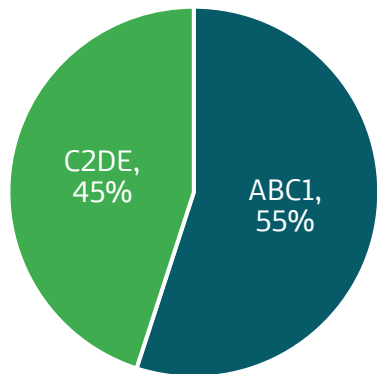
Gender



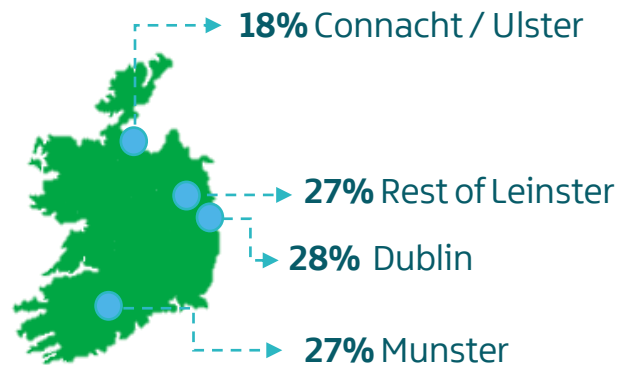
Lifestage



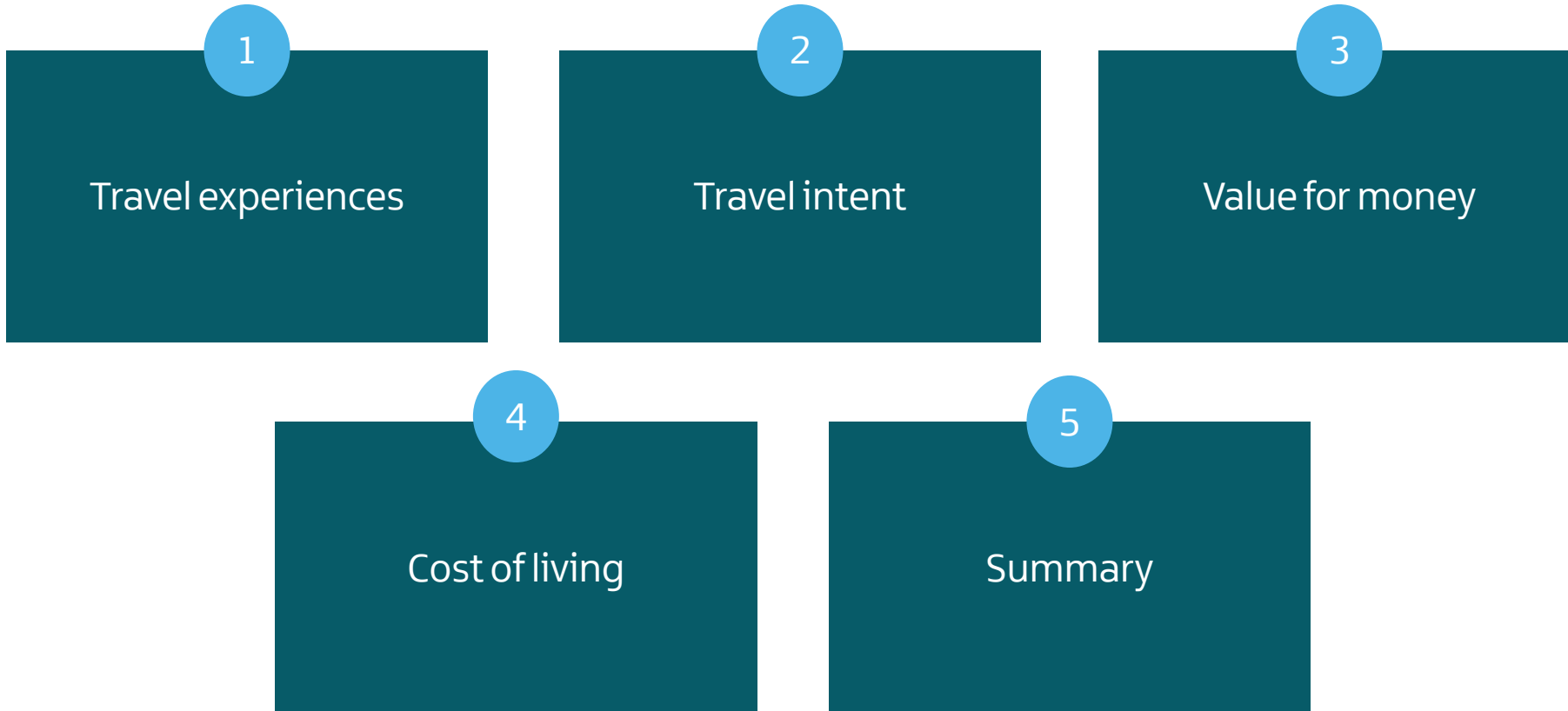
Socio



Region



Contents





Travel experiences

ROI visitors favour day trips and short breaks to NI, while 2 in 5 have travelled abroad so far in 2026

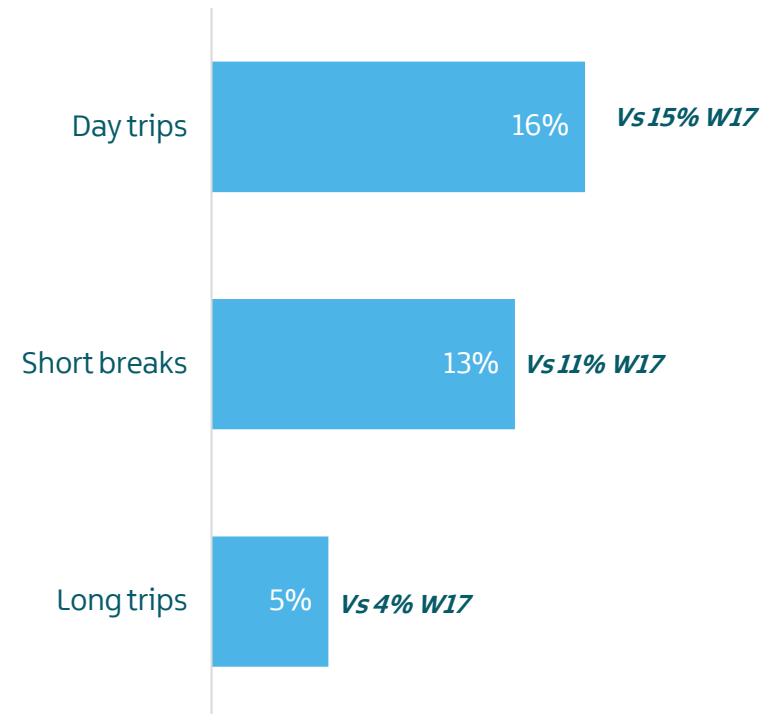
16%

*Vs 13% 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 to NI



Other than NI...

30%

took a break in ROI
Vs 31% W17

37%

went abroad
Vs 33% W17

42%

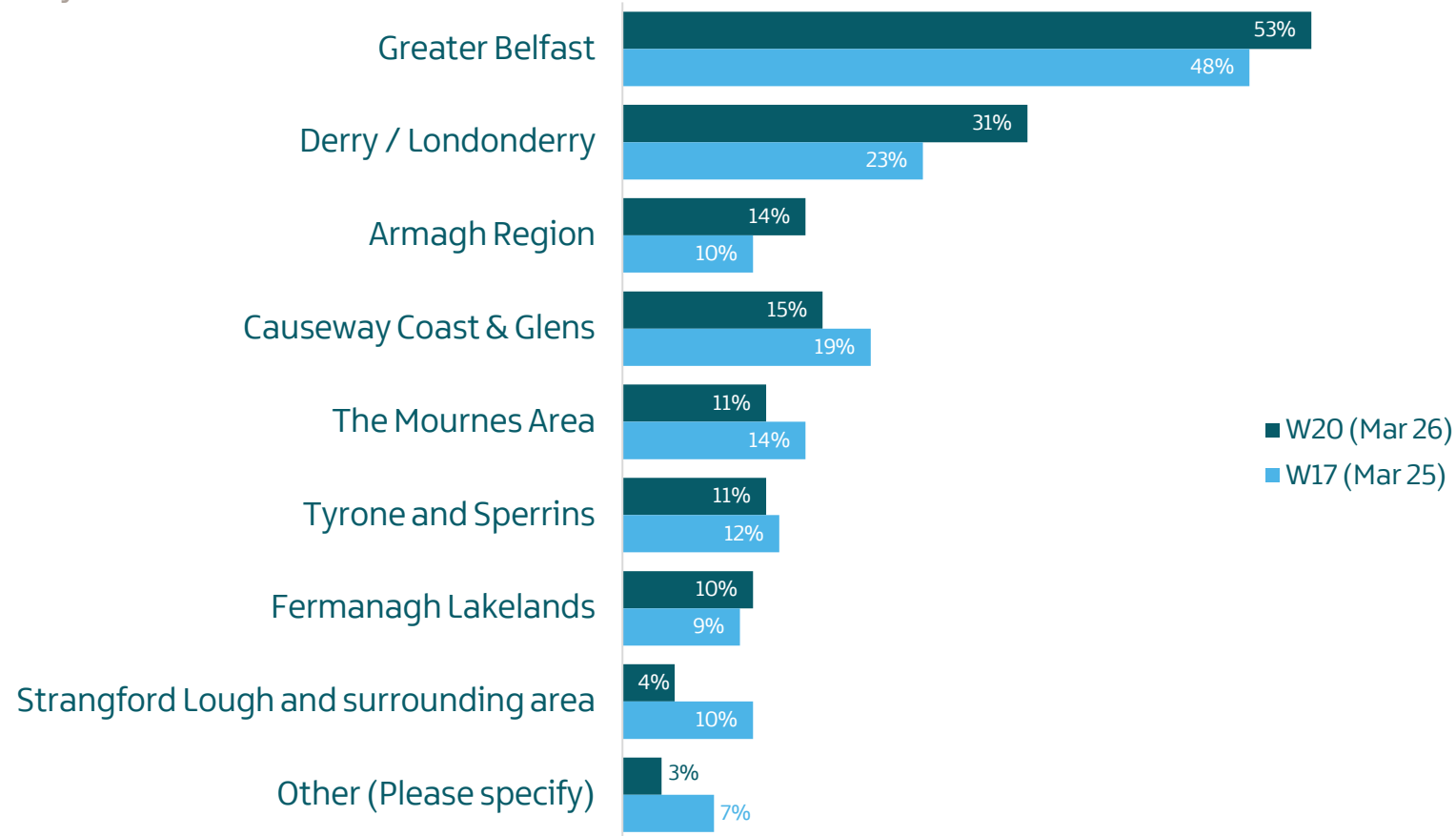
didn't travel at all
Vs 45% W17

N = 750

D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes during 2026?

Belfast remains the main draw, but Armagh's rise in ranking suggests growing appeal

Where they visited in NI in 2026

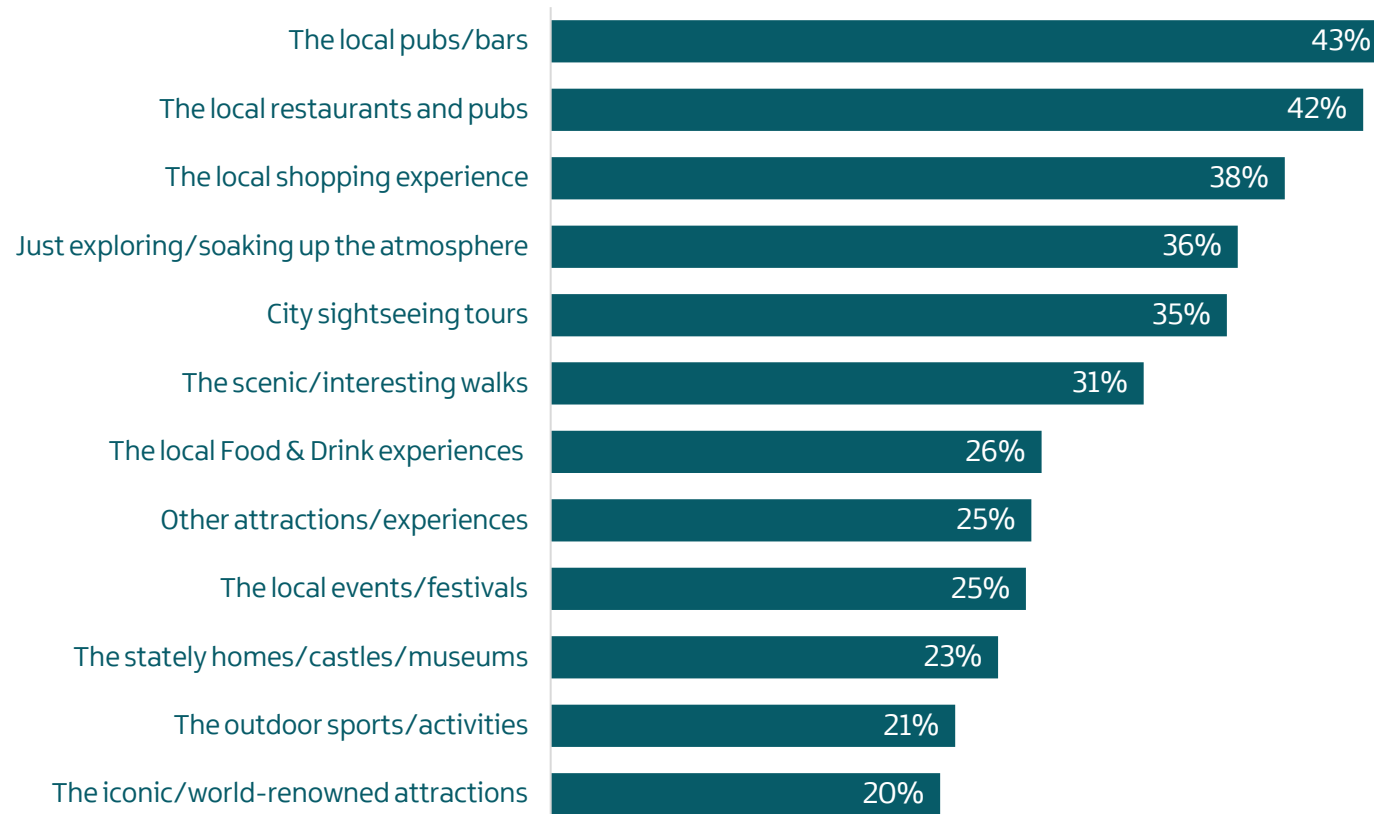


Trips to Derry / Londonderry are driven by 18-54s, who are significantly more likely than over 55s to visit

N = 185 took any trip in NI in 2026

Visitors are engaged by everyday local experiences, not just headline attractions

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



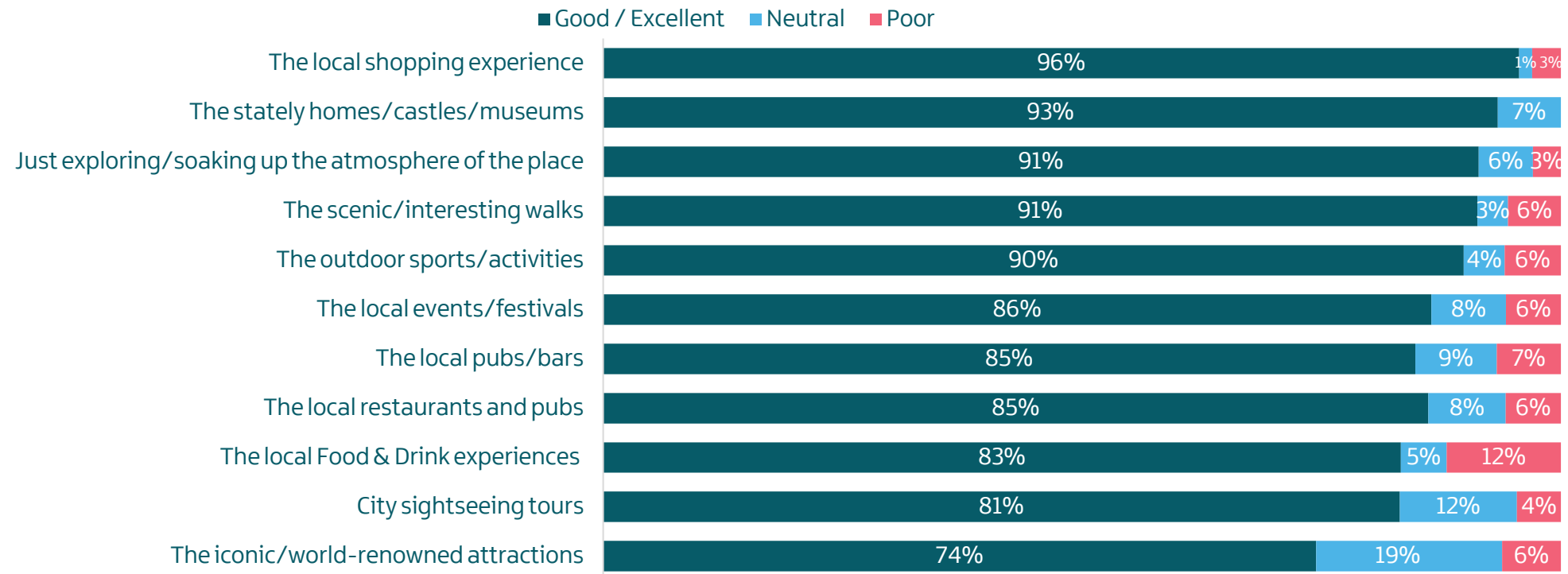
Walking is more popular among those over 35, while 18-34s are more likely to enjoy local Food & Drink experiences.

Local pubs and bars rank top among all segments. Outdoor sports & activities stand out for Active Maximisers.

N = 120 took a short or long break in NI in 2026

There is a high level of satisfaction with a wide range of experiences

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



N between 37 and 83 (depending on which activities were undertaken) – NB: low base for some activities

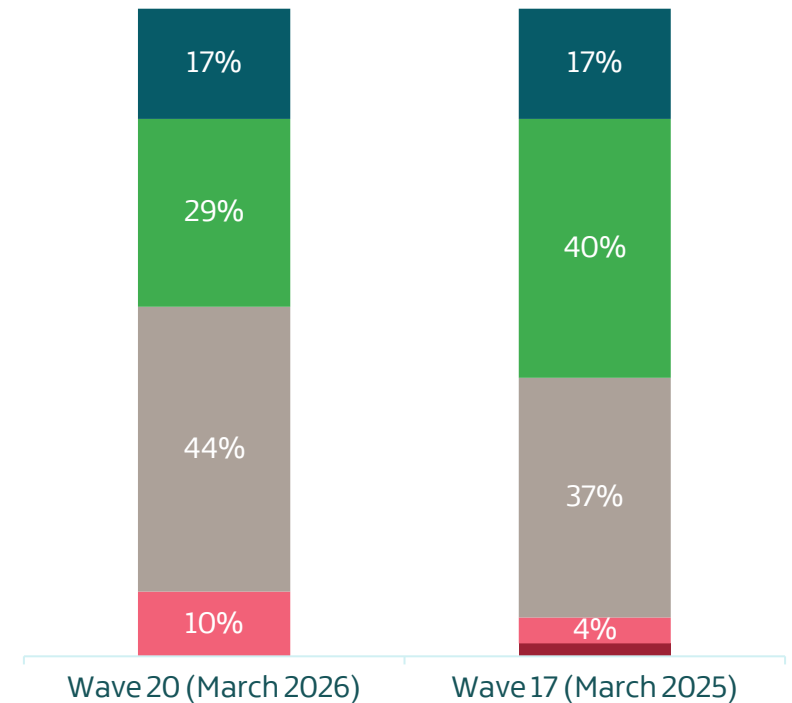
Expectations are being consistently met and exceeded among ROI visitors

90%
had their expectations met or exceeded

vs 94% in Wave 17 (Mar '25)

Those who visited NI felt their trip...

- Far exceeded my expectations
- Slightly better than my expectations
- Met my expectations
- Slightly below my expectations
- Fell far short of my expectations



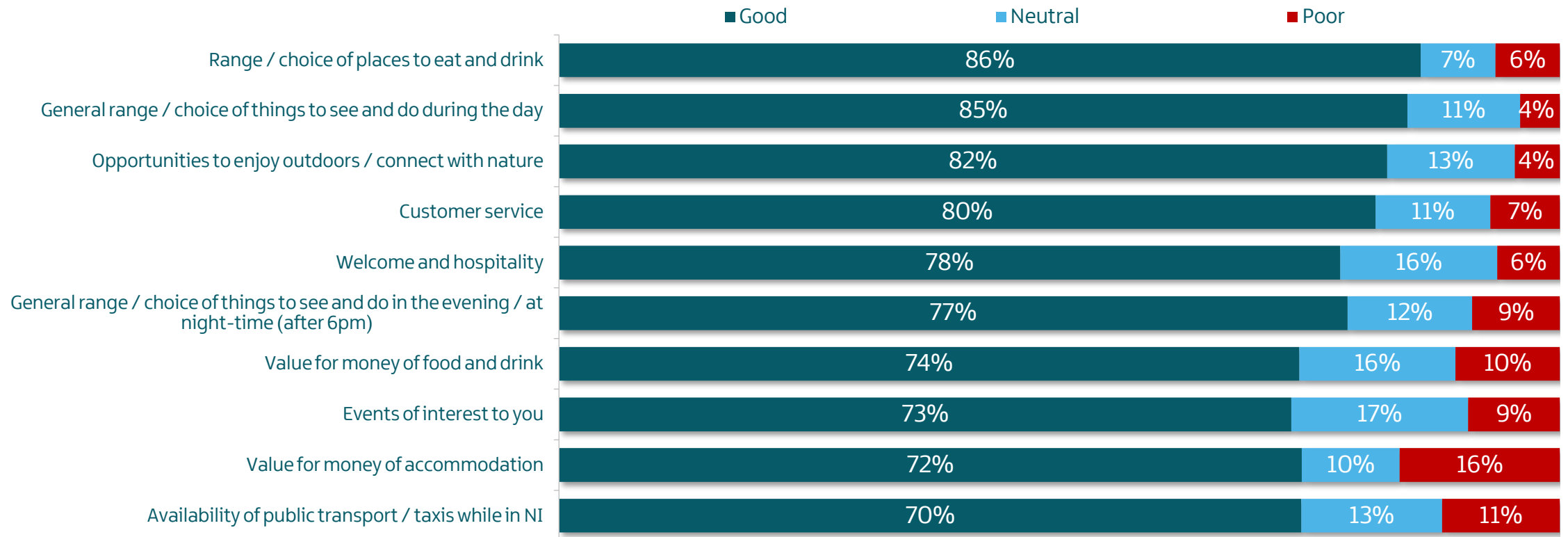
N = 120 took a short or long break in NI in 2026



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

NI continues to deliver a reliably positive experience across daytime, evening and value-led touchpoints

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



N = 185 (Took a break in 2026)

A high-angle, wide shot of a rugged coastline. On the left, a steep, rocky cliffside descends towards a rocky cove. A wooden walkway with railings spans across the cove, connecting two points of land. The water is a deep, vibrant blue, with white foam from waves crashing against the rocks. The sky is clear and bright. The overall scene is one of natural beauty and adventure.

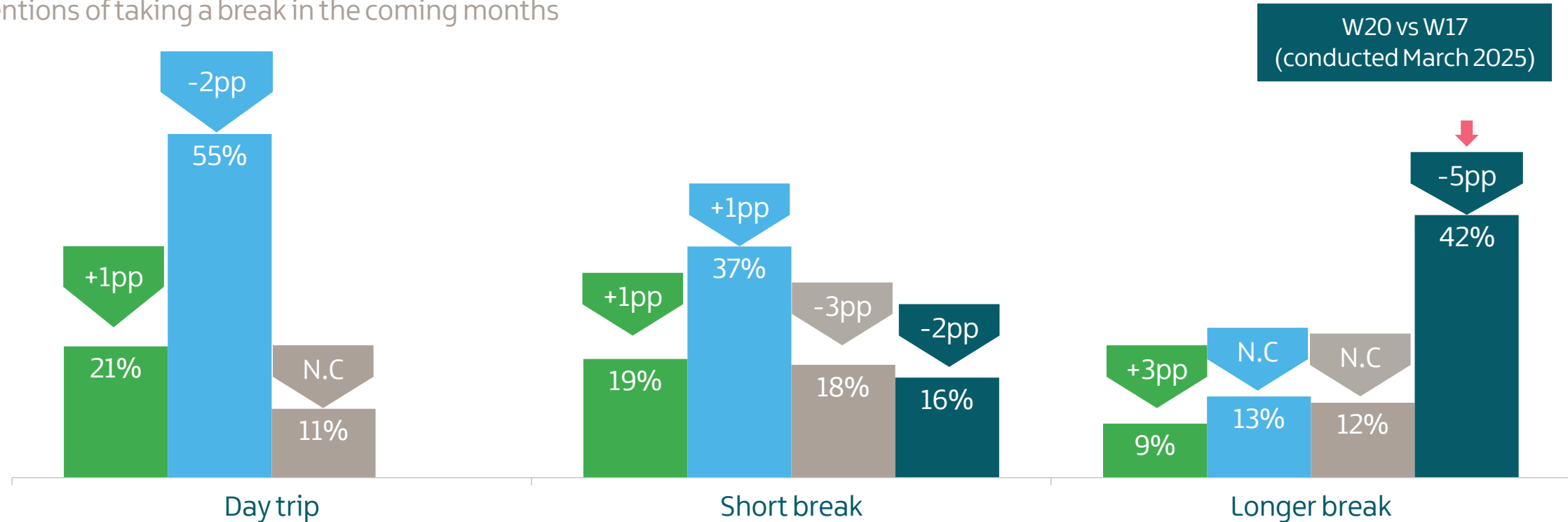
Travel intent



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Intent to visit NI is steady, while fewer intend to travel abroad in the coming months

Intentions of taking a break in the coming months



↑ sig. higher / lower than prev. year
↓

■ Northern Ireland

■ Republic of Ireland

■ Britain

■ Abroad

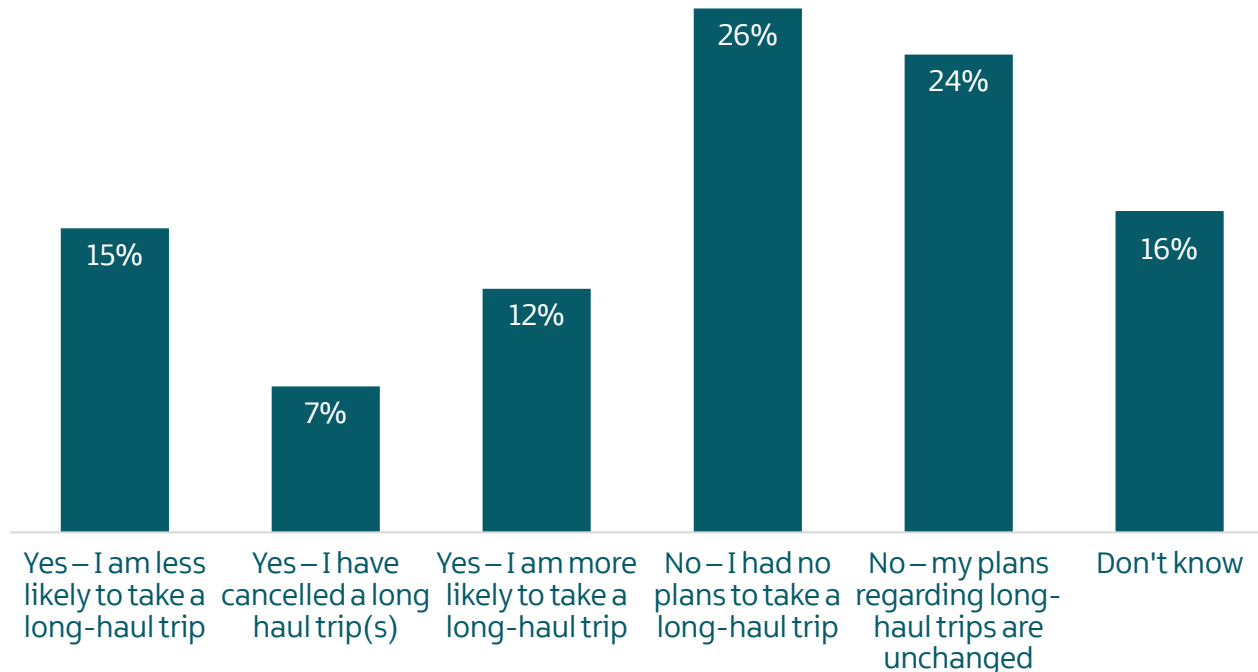
Base = 750



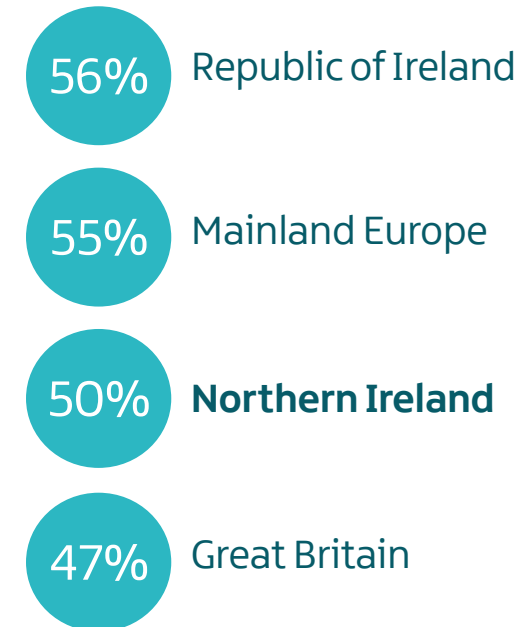
E1b/c/d. Would you consider taking a leisure day trip / short break of at least 1-3 night / longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March-June)?

While there is continued appetite in some segments, 1 in 5 are less likely to travel long-haul, or have cancelled a trip, with many likely to consider NI instead

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

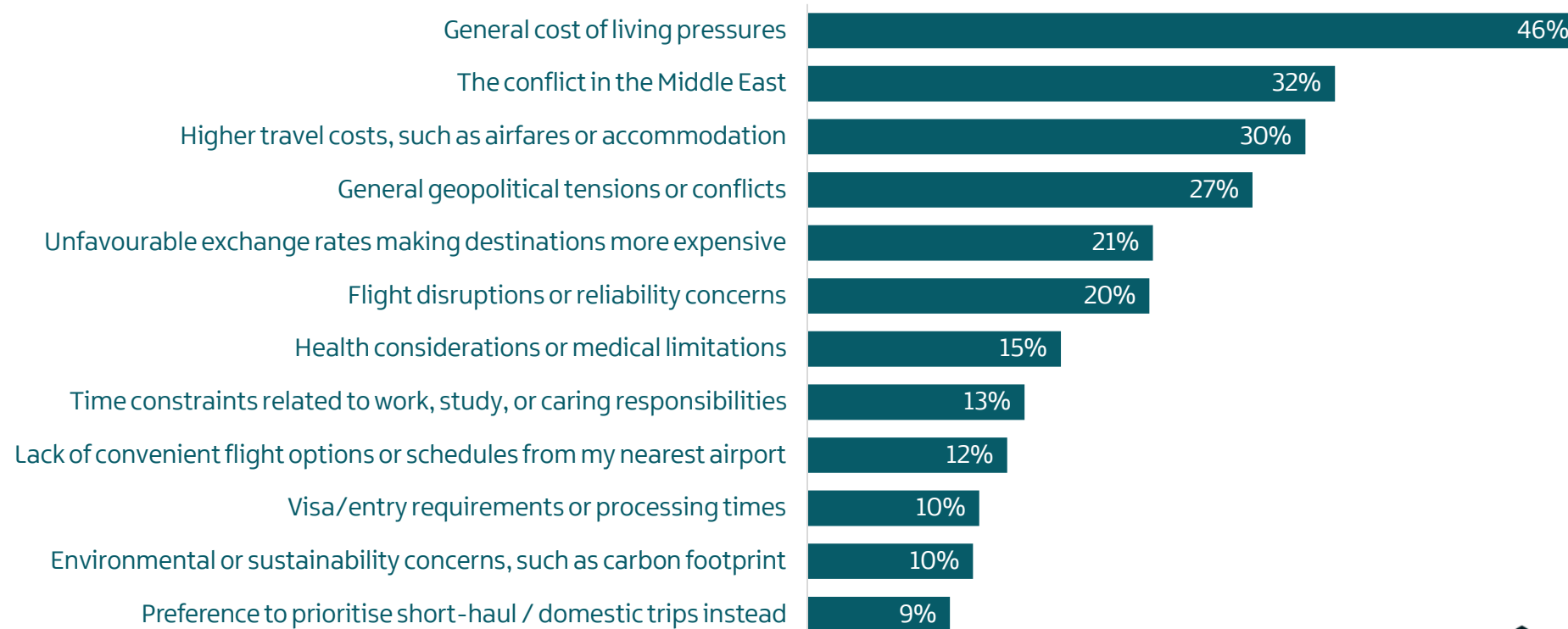


Base = 750 / 167 less likely to take or cancelled a long haul-trip

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 & 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

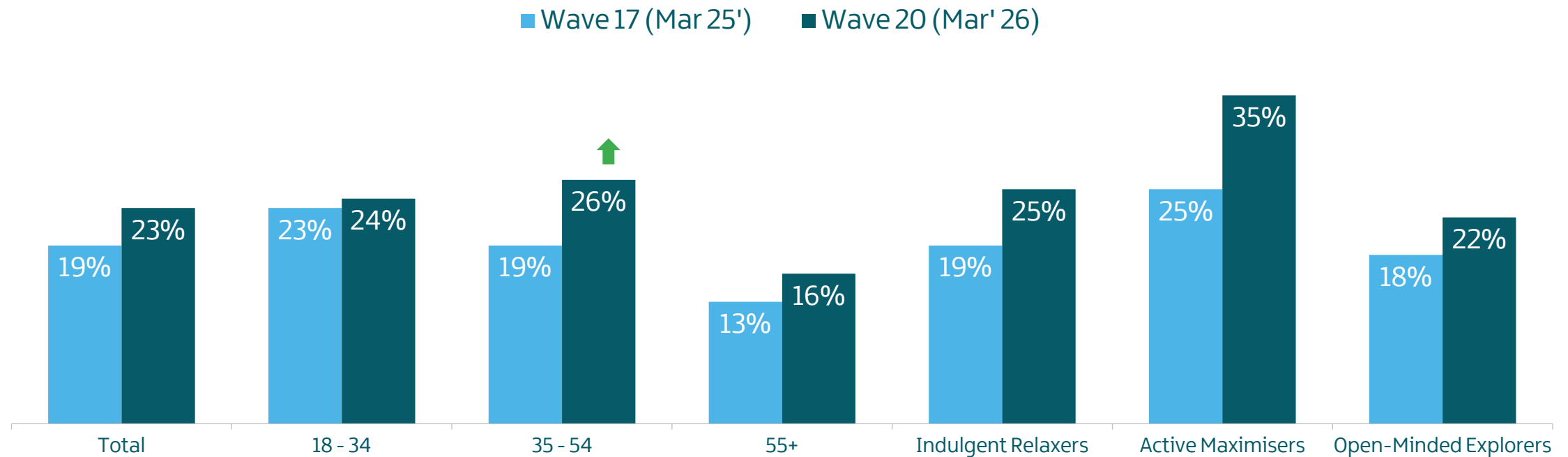


Base = 167 less likely to take / cancelled a long-haul trip

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 trip intentions have risen among 35-54s, while over 55s continue to show lower intent to visit

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

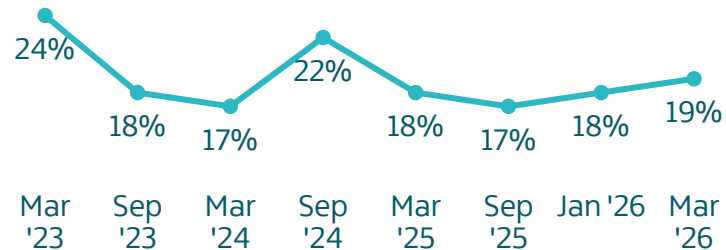


↑ sig. higher / lower
↓ than prev. year

Base = 750

Among those considering a short-break, certainty has increased year-on-year, with May the key travel month

19%
are considering a short break in NI in March - June



Base = 750 / 143 considering short break

Status of short break – have they booked?

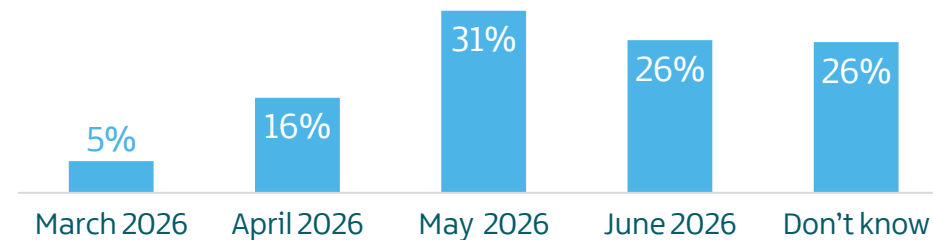
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■ Booked ■ Actively planning ■ Intend to start planning later ■ May or may not plan



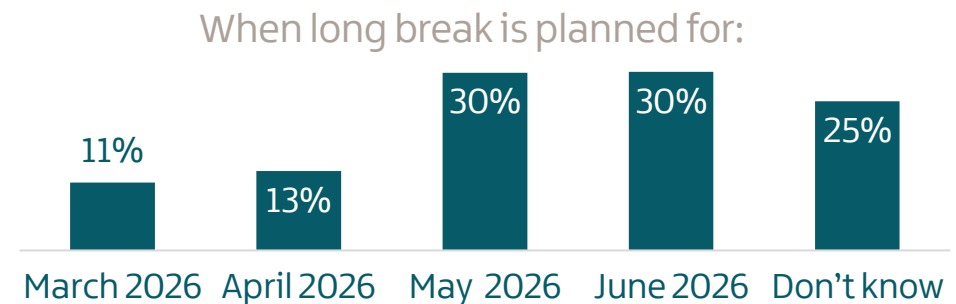
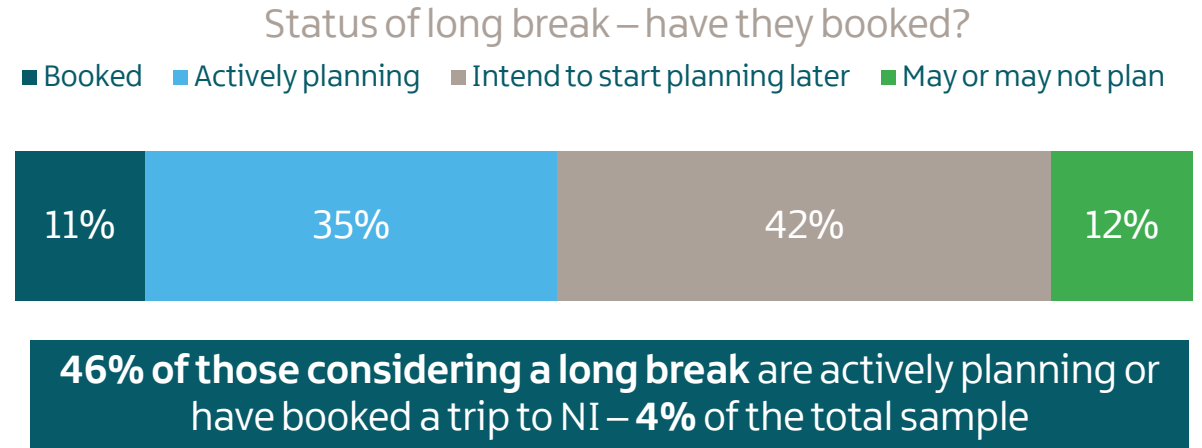
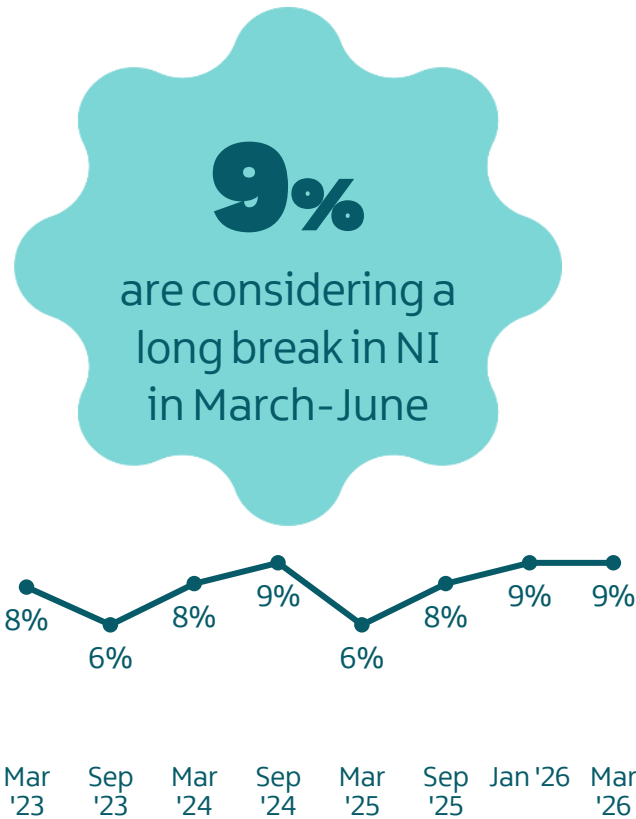
50% of those considering a short break are actively planning or have booked a trip to NI – 10% of the total sample

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, 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?

Among those considering a long-break, fewer than half are actively planning or have booked

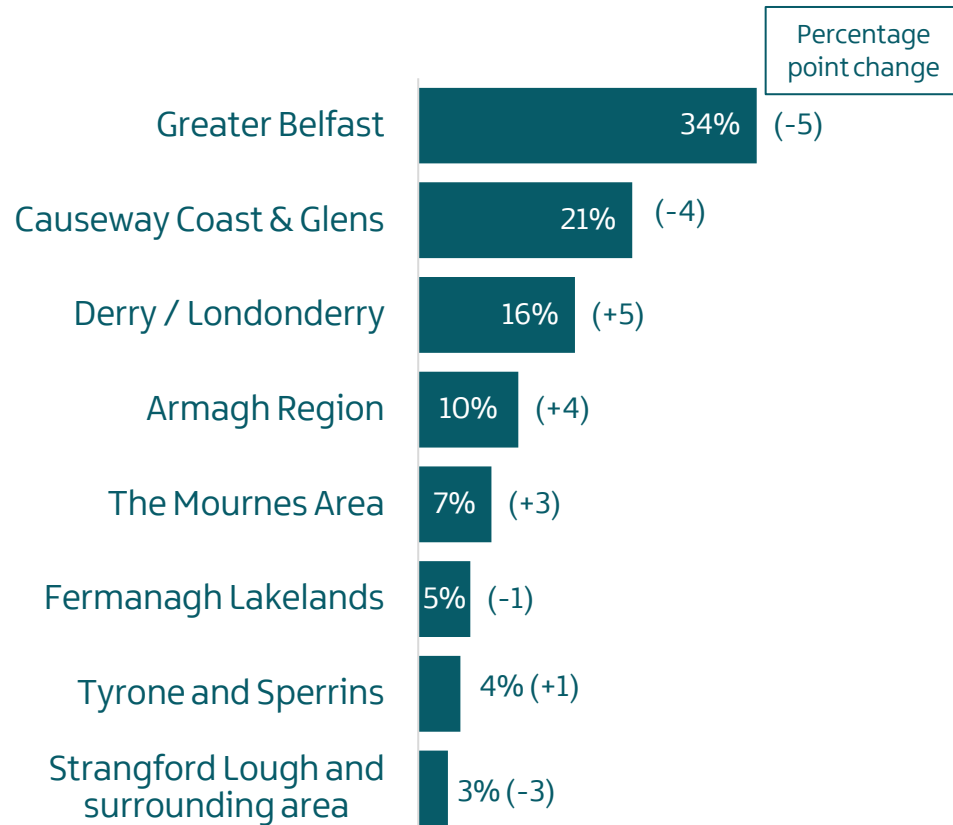


Base = 750 / 68 considering long break

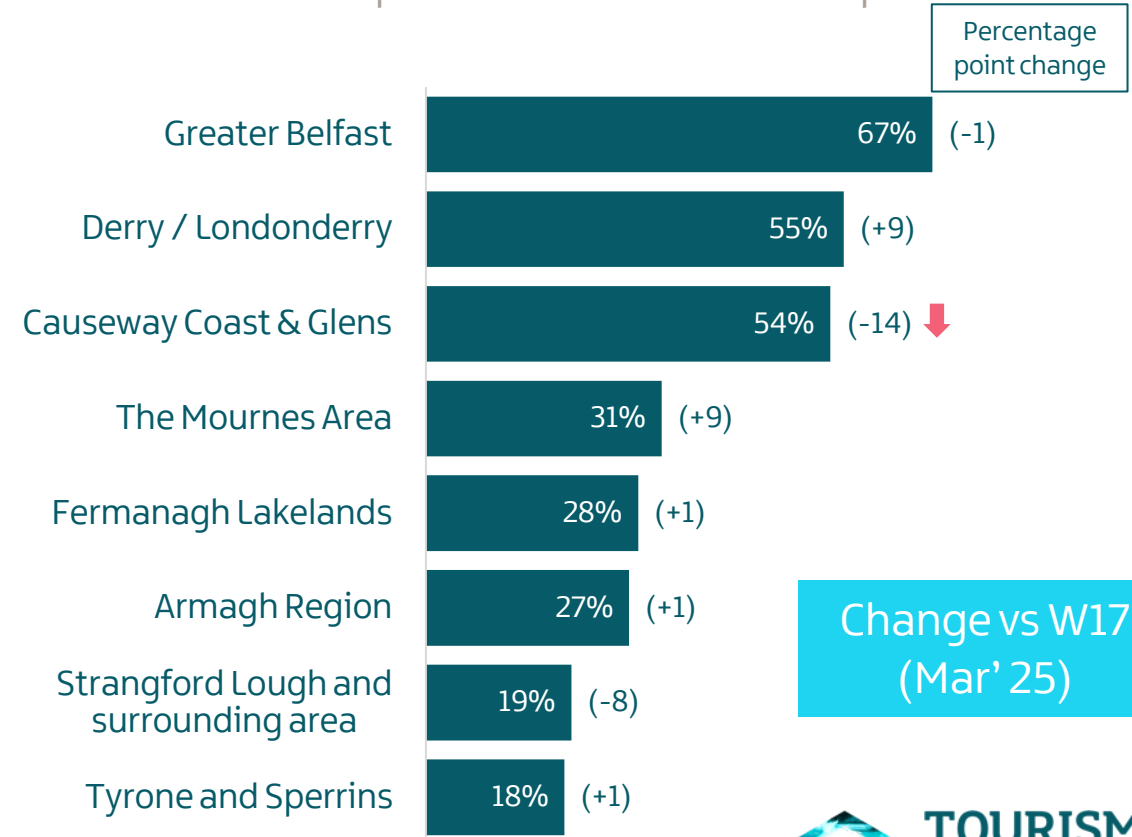
E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March-June)? / E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland/ E3.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

Derry/Londonderry continues to rise in popularity, while fewer intend to visit the Causeway Coast

Destinations selected as no. 1 consideration for next trip



Destinations in top 3 consideration for next trip



Change vs W17
(Mar' 25)

Base = 170 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?



↑ sig. higher / lower
↓ than prev. year

Emotional drivers are key drivers to visit NI, with experiences and quality time leading the way

Trip motivations (long and short combined) – top 8

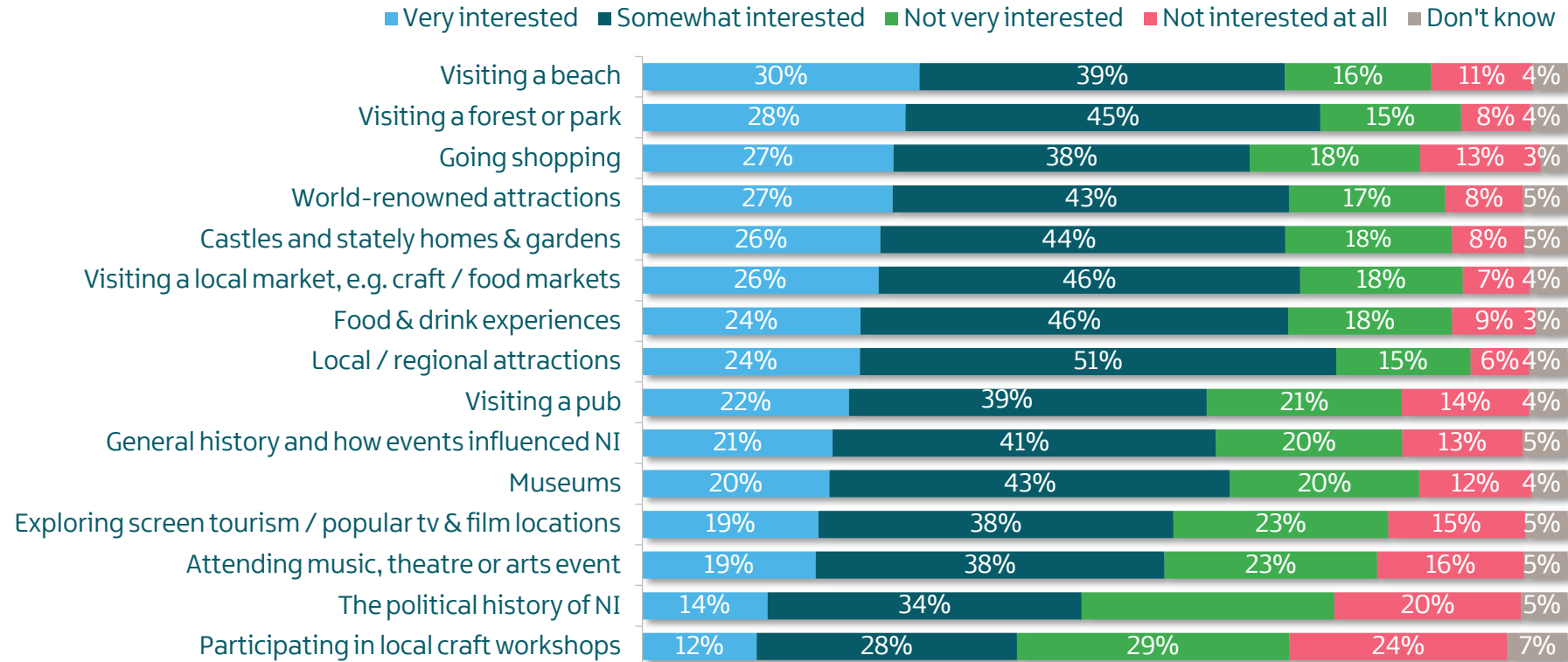


Base = 146 planning long or short break (excl. "may or may not plan")

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 everyday local experiences attract the greatest interest for future NI trips

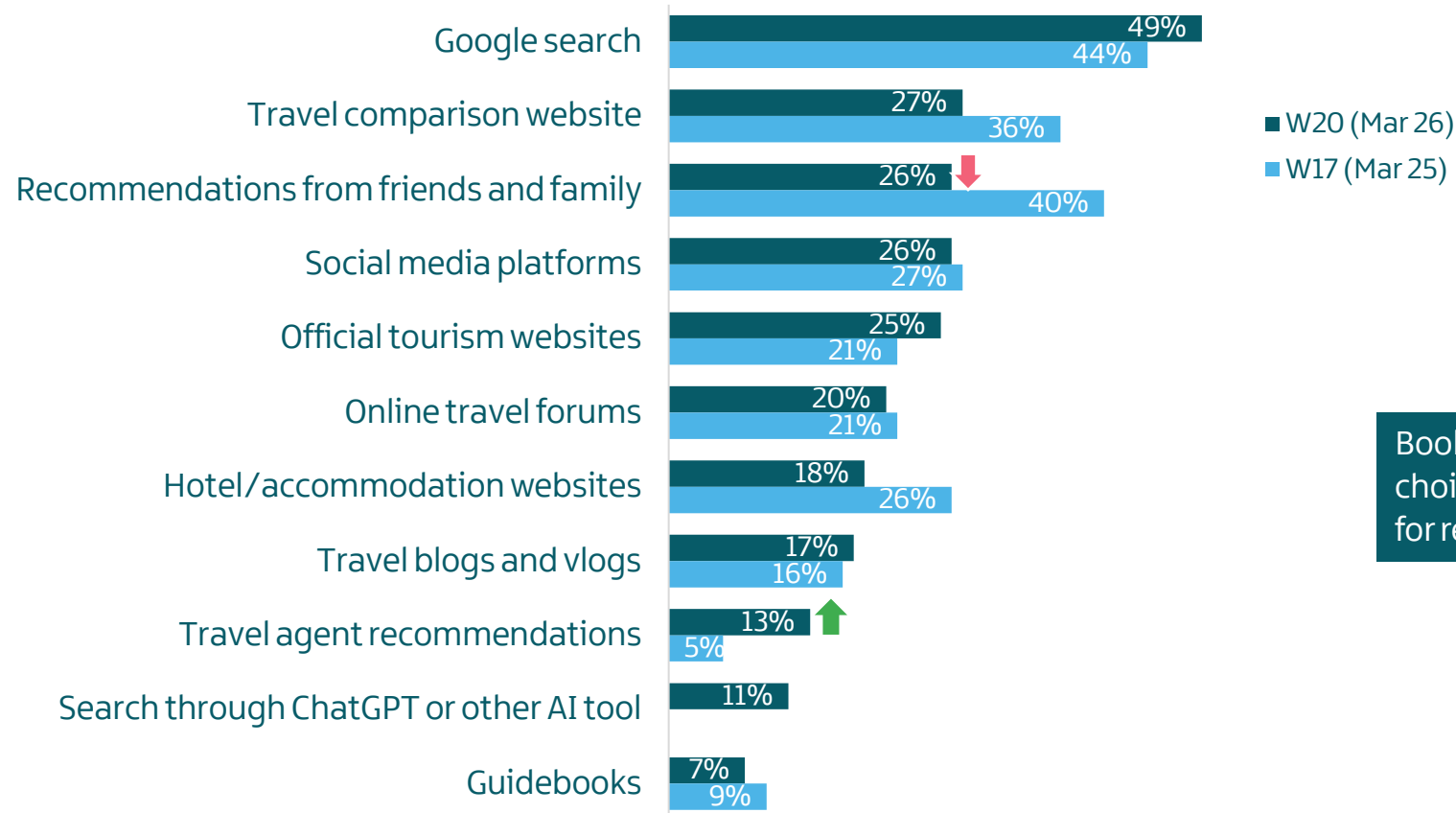
Interest in NI experiences



Base = 750

Fewer sources now shape decisions, with travel agents and AI growing in influence as word-of-mouth declines

How people plan to research their trip



Booking.com is the main choice of comparison site for research purposes

Base = 146 planning long or short break (excl. "may or may not plan")

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?

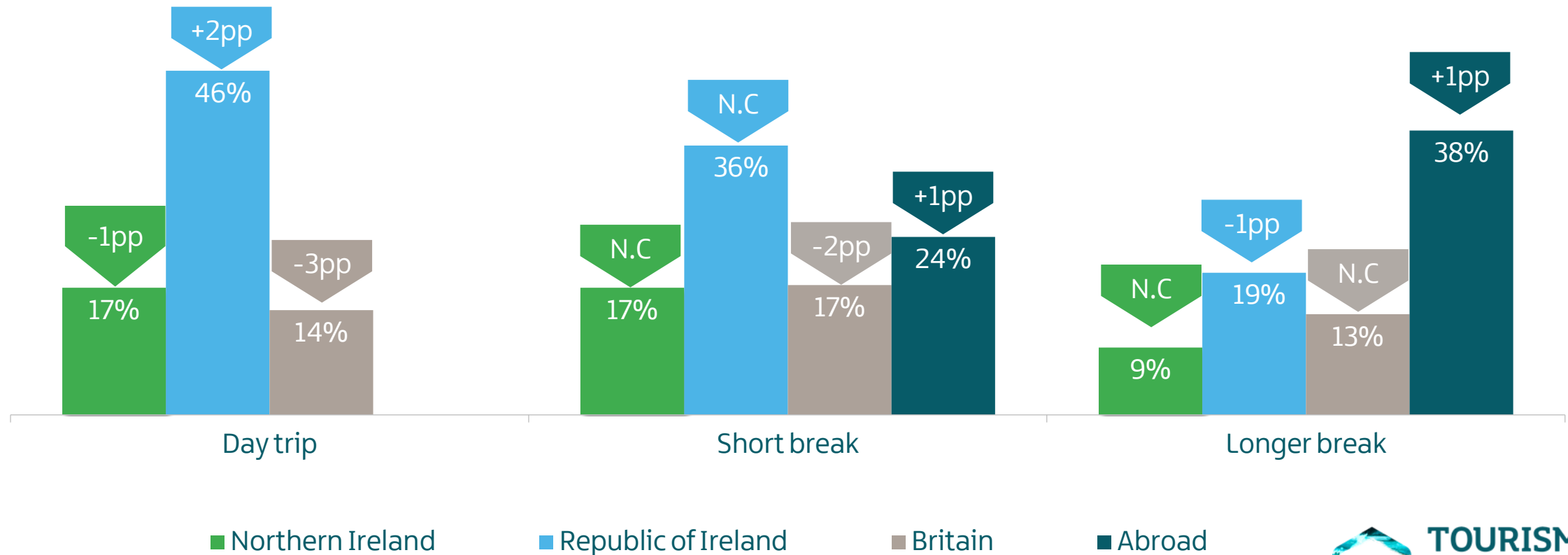


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Although people are less likely to travel abroad in the near term, summer plans, and NI trip intentions, are similar to 2025

Intentions of taking a break in summer 2026

Wave 20 Vs Wave 17
(conducted March 2025)



Base = 750

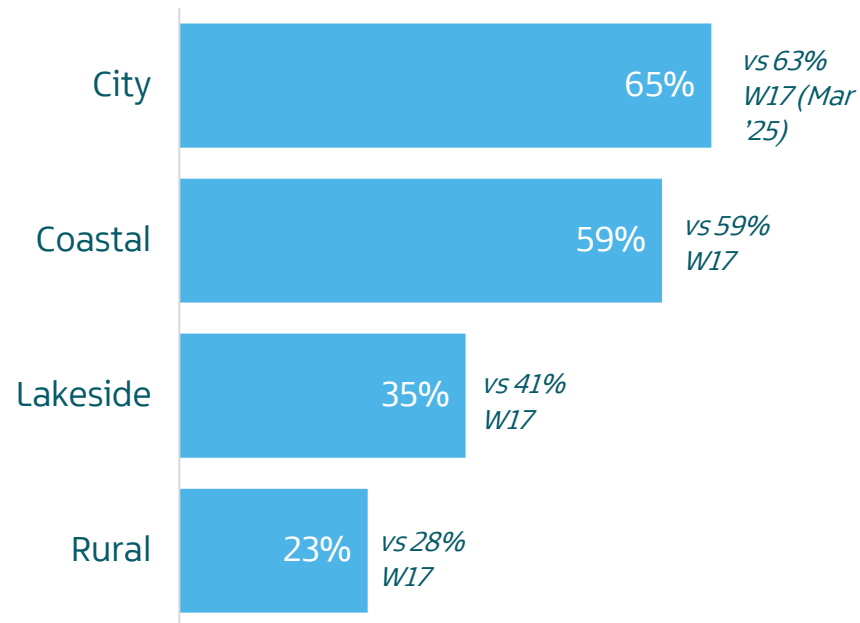
E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in summer 2026? E24b. Would you consider taking a short break of at least 1-3 nights in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in summer 2026? E24d. Would you consider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



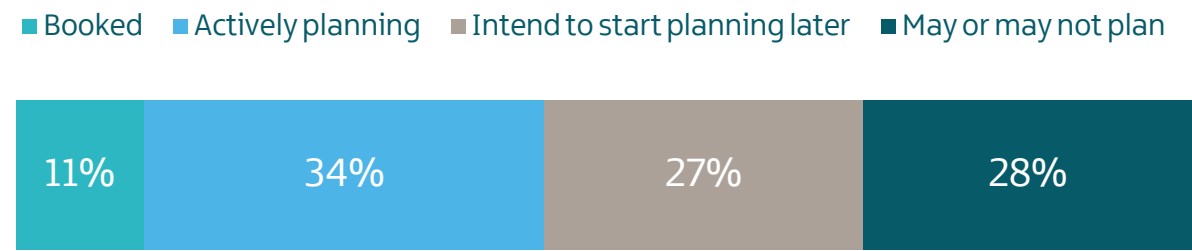
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↓ than prev. year

People are looking for city and coastal breaks in the summer, while for many NI summer plans aren't firmed up

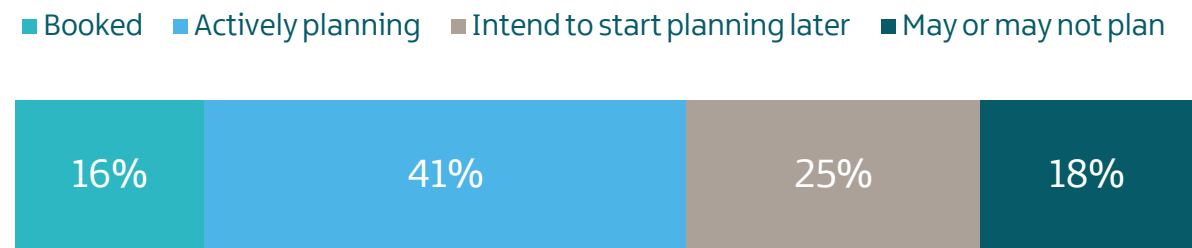
Type of break considered



Amount of short break planned



Amount of long break planned



Base = 148 considering long or short break in summer 2026

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

People planning to travel abroad this summer are largely committed, with August the peak month

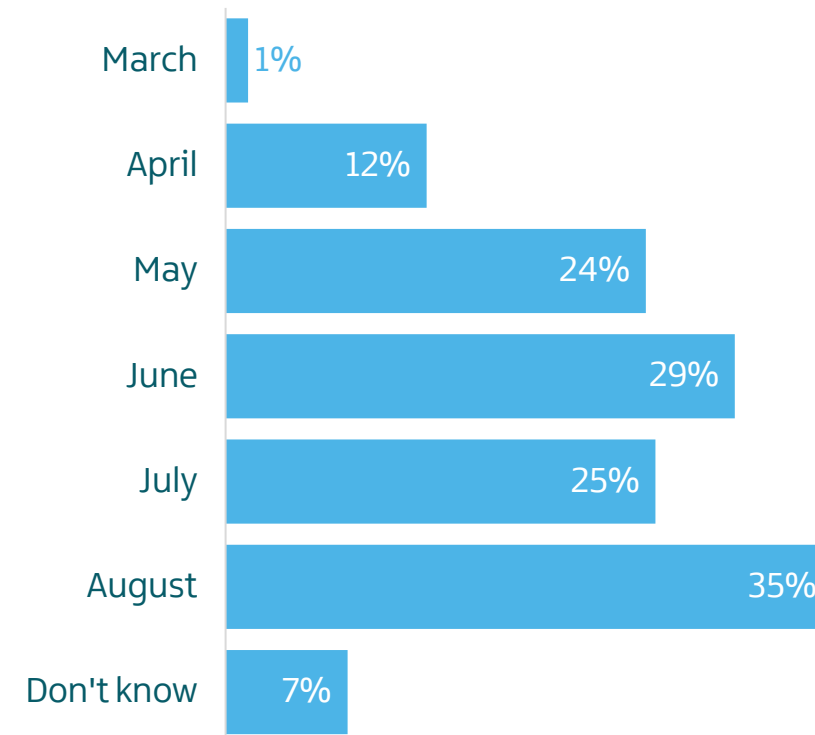
57%

of total sample are considering a break abroad in the next 6 months
(vs. 60% W17 - conducted in March 2025)

70%

of this cohort are actively planning or have booked their trips
(vs. 66% W17)

When trips abroad are planned for



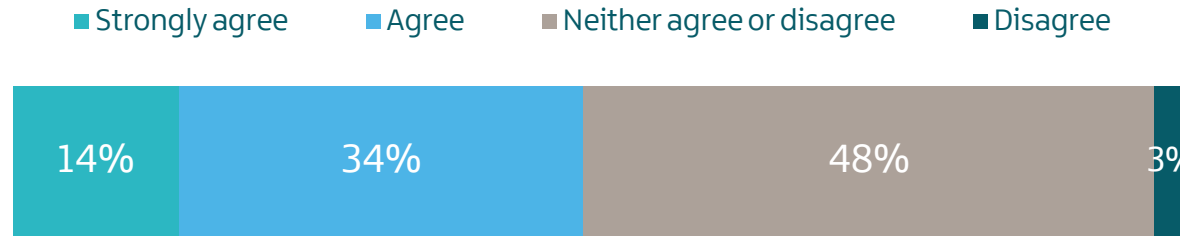
Base = 424 considering a trip abroad

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?

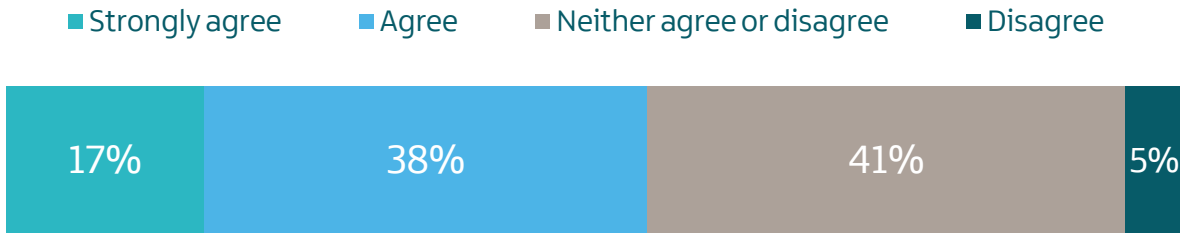
Over half of ROI dog owners believe NI is a dog friendly destination

47%
Have a dog

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

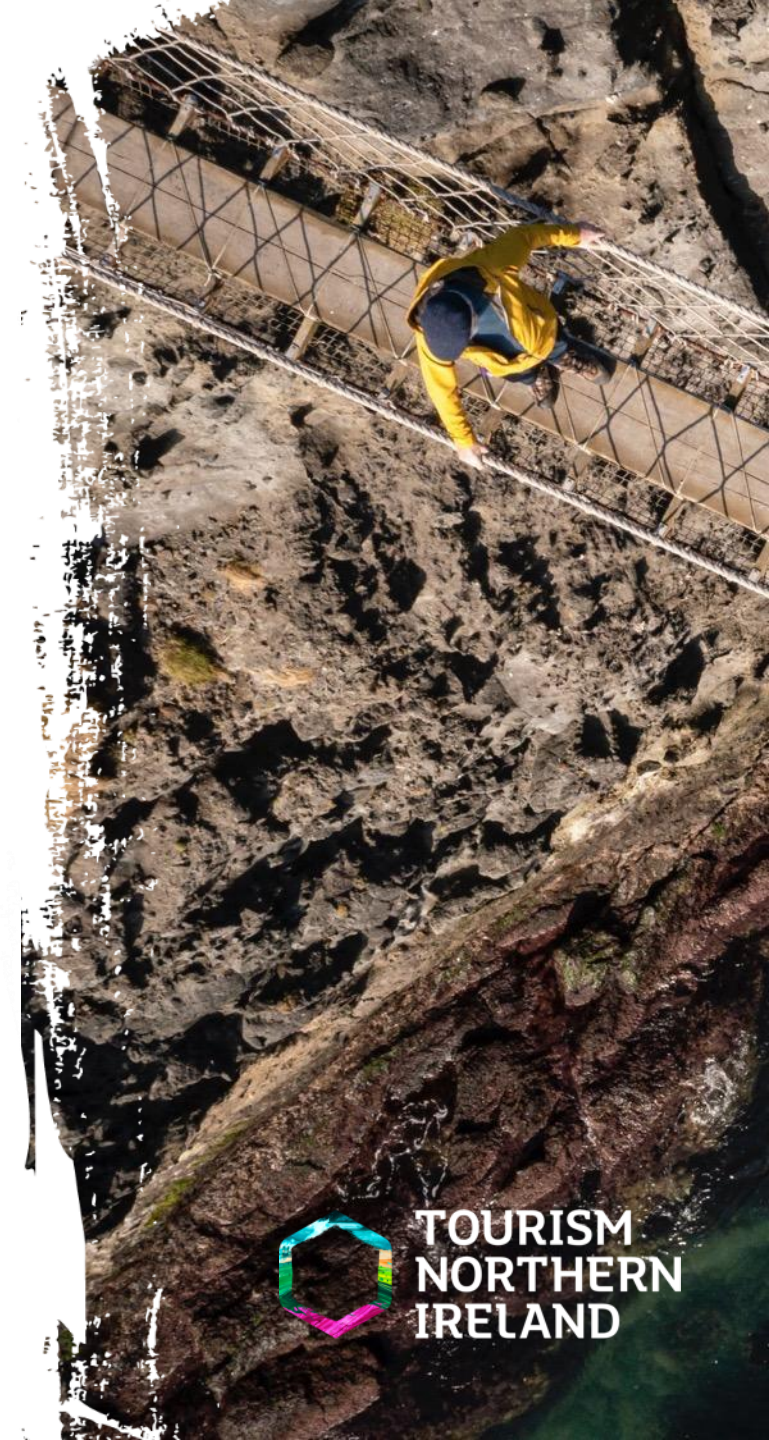


Agreement that NI is a dog friendly destination (DOG OWNERS)



Base = 750

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

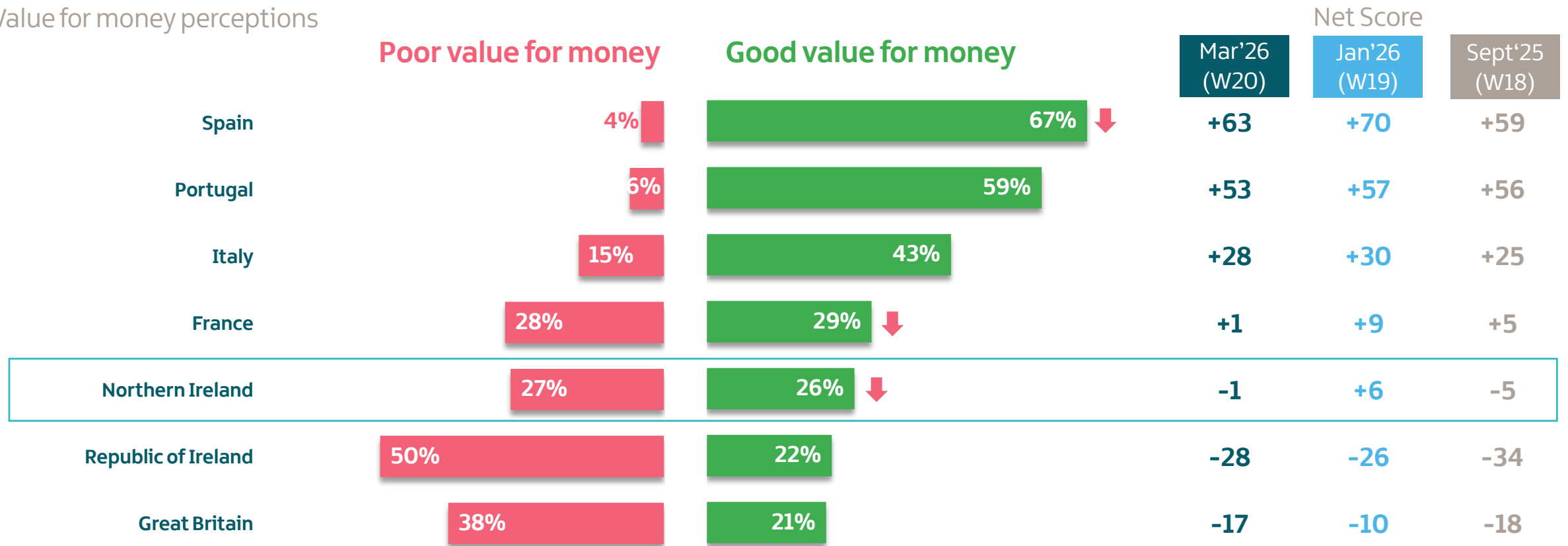




Value for money

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

Value for money perceptions



↑ sig. higher / lower
↓ than prev. wave

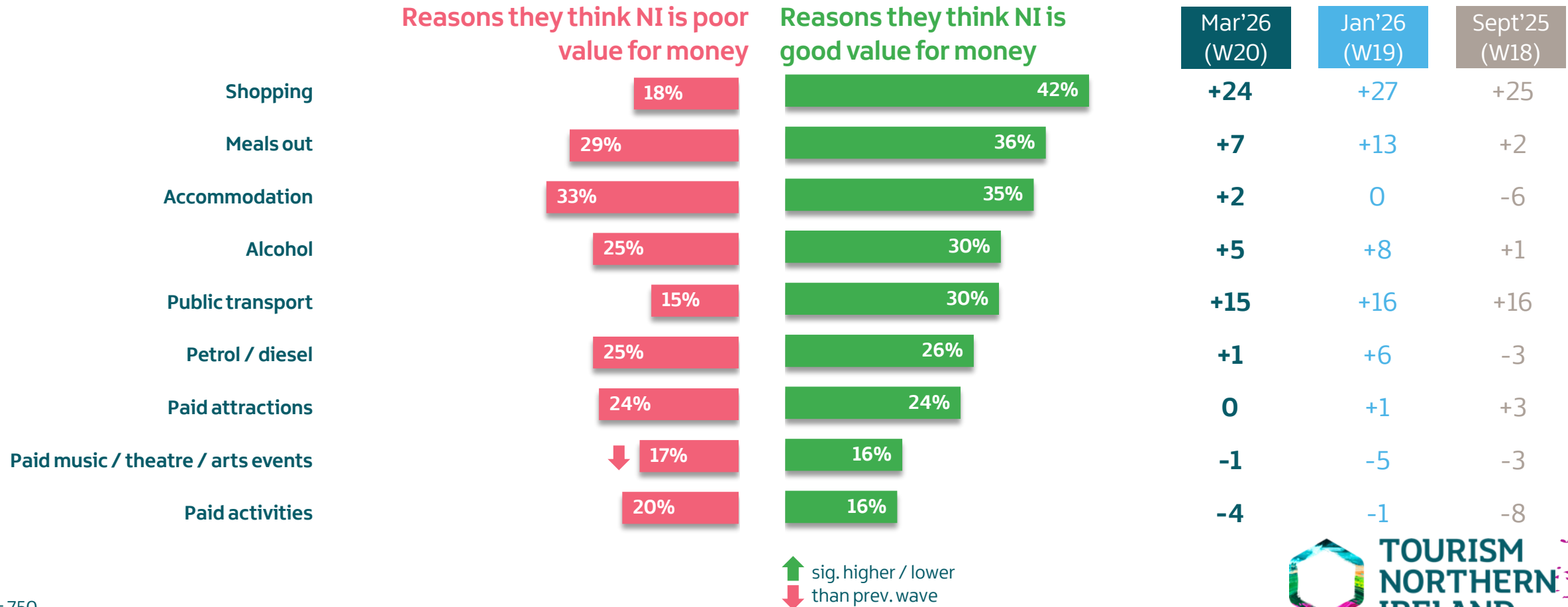
N = 750



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

VFM perceptions remain strongest for shopping, meals out and accommodation

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



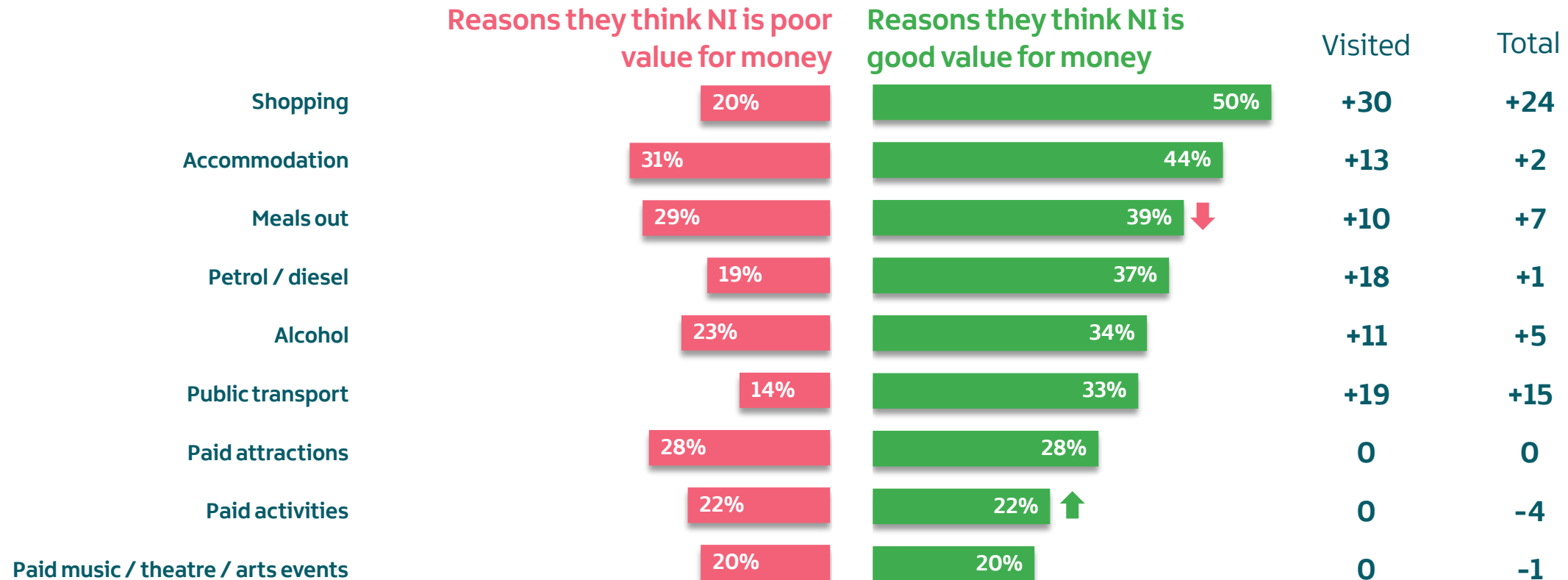
N = 750



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?

Taking a trip to NI boosts VFM perceptions, especially for accommodation and petrol costs

Why they think NI is poor or good value for money as a holiday or short break destination – Those who visited NI



Total N = 750, Those who took a trip in NI = 185

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?



↑ sig. higher / lower
↓ than prev. wave



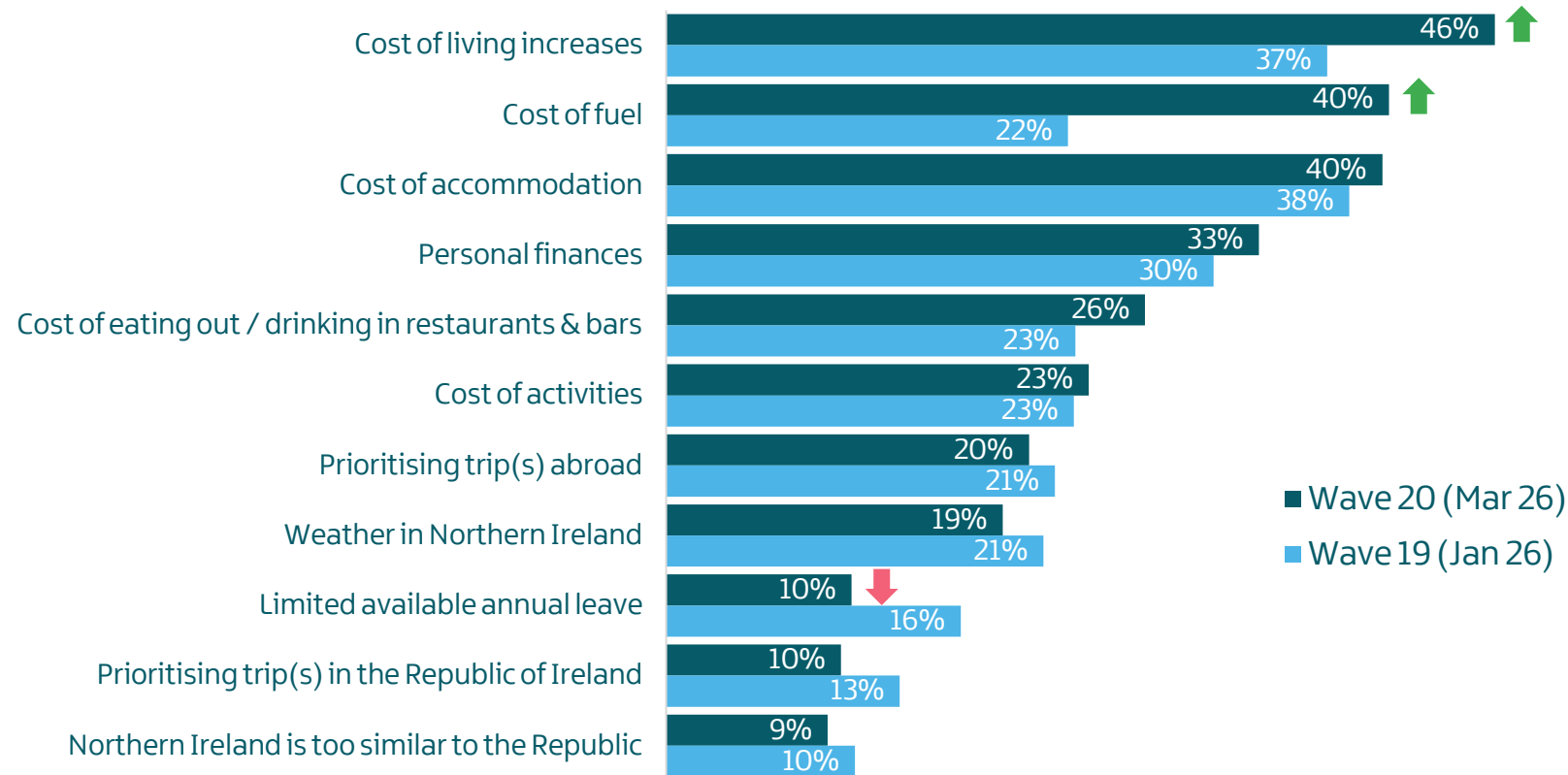
Cost of living



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Fuel price rises and cost of living increases are progressively shaping travel decisions

Barriers to visiting NI



Increasing cost of fuel worries are seen across all ages, but particularly strong for over 55s.

N = 750

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?

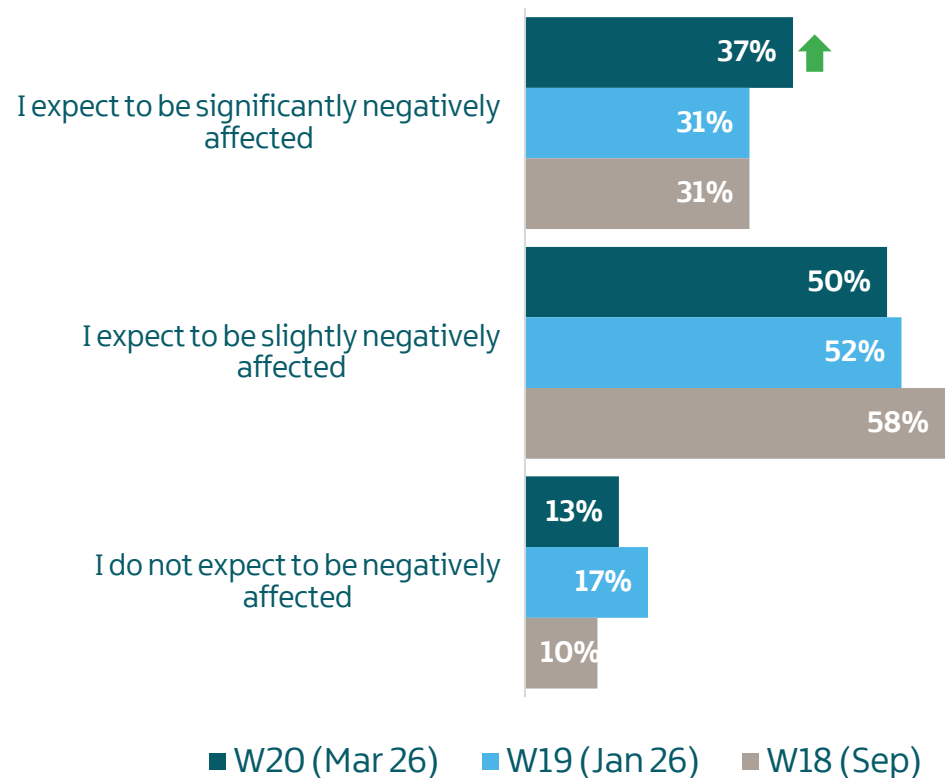


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Rising cost-of-living concerns

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

87%
expect to be affected by cost-of-living increases



Over-55s are driving the increase in those feeling most affected by cost-of-living pressures

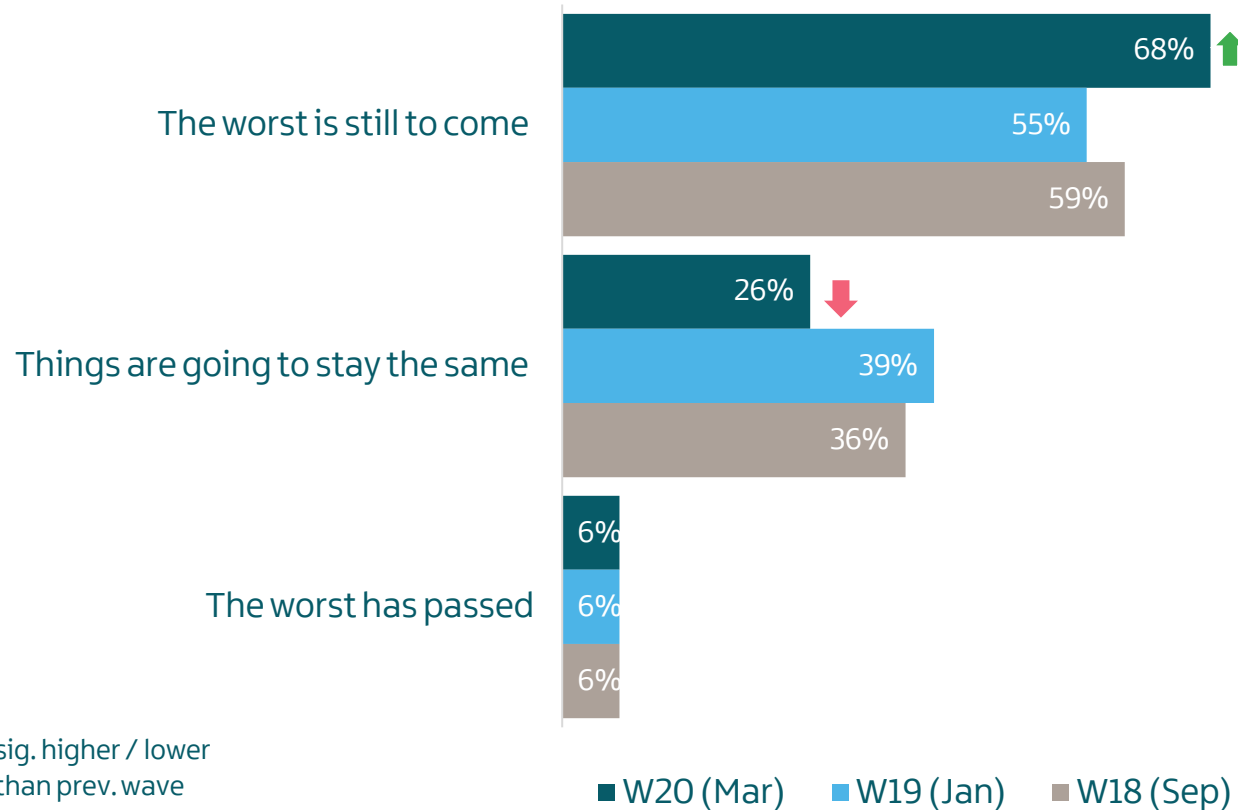
N = 750



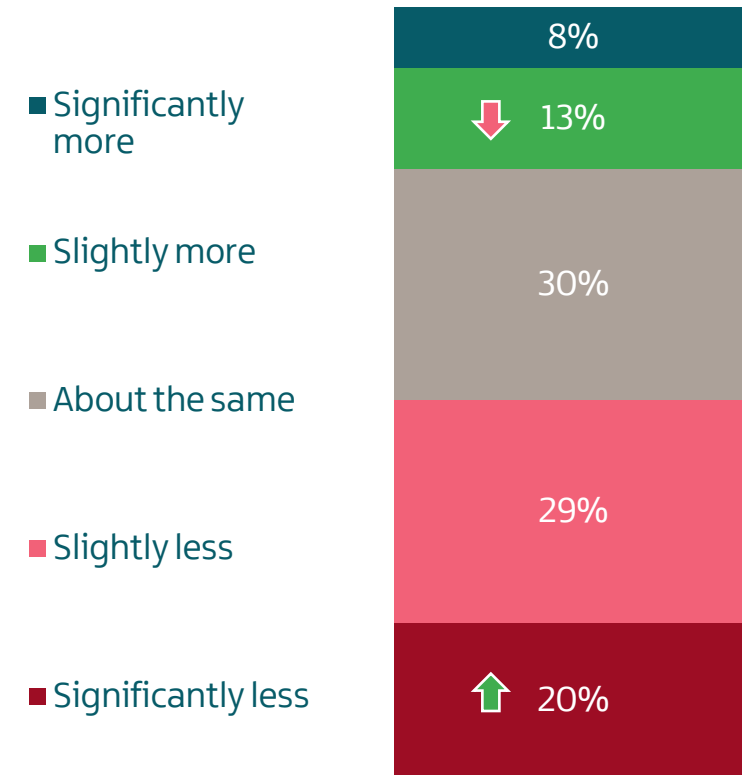
F1. To what extent do you expect to be financially affected by cost-of-living increases in the coming months?

Cost-of-living pressures are expected to worsen, with less to spend on holidays

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



How disposable income to spend on activities/ holidays has changed



N = 750

F2. Over the coming few months, how do you think the cost-of-living crisis is going to change in Republic of 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?

More people are planning to take fewer holidays – or not travel at all, making each trip decision more considered

Things people are more likely to do in relation to short breaks/holidays



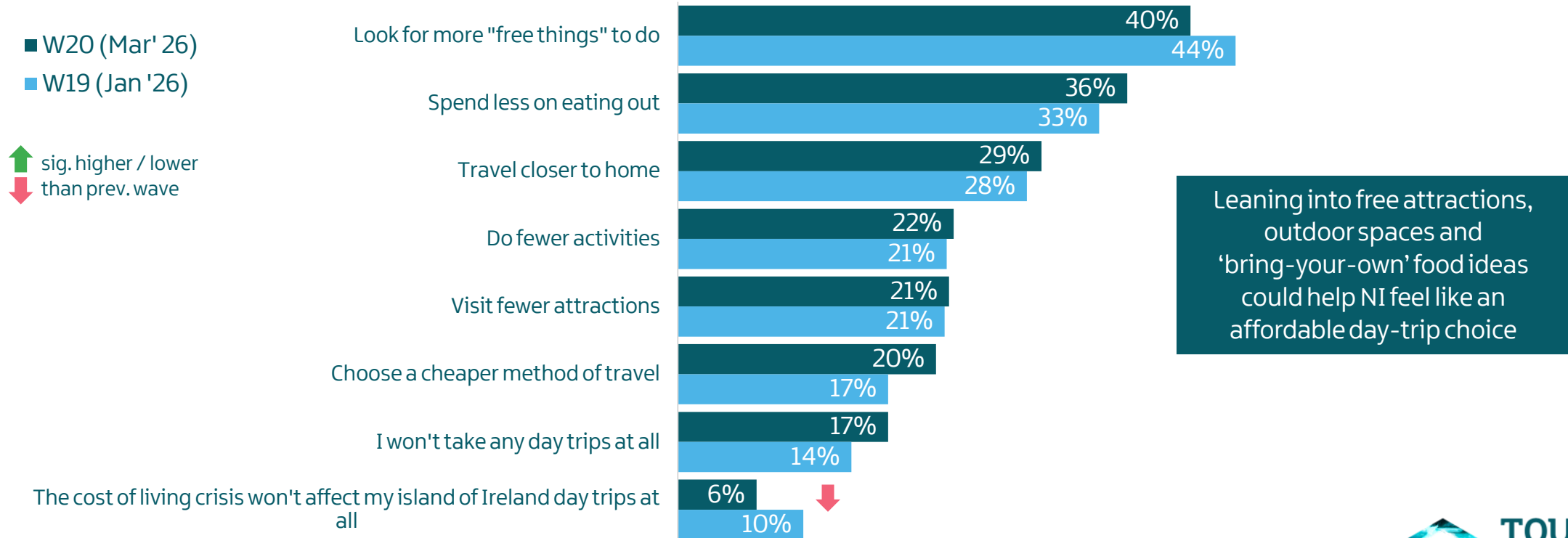
18-34s are driving the rise in non-travel, while 35-54s are leading the shift to fewer holidays

N = 750



Day trips are value-led, with people seeking free local activities and looking to spend less on food

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



N = 750



Summary



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Key Takeaways

Visitation and visitor experience remain steady year-on-year

Visitation to Northern Ireland remains stable, and those who have visited continue to report positive experiences. Satisfaction levels are broadly unchanged year-on-year.

NI travel intentions remain resilient

For the months ahead, ROI intent to take NI day trips and short breaks remains stable, while longer breaks have edged up slightly as overseas travel softens. Looking ahead to summer, intention to visit NI is steady.

Value for money perceptions have eased, but strengthen markedly 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.

Rising cost pressures and global instability create both risks and opportunities for NI tourism

Concern about the cost of living has increased since the previous wave, with more consumers expecting to be financially affected. Around one in five ROI consumers have cancelled or reduced long-haul travel plans for the next six months. Financial pressure remains the main driver, while one in three also cite the Middle East conflict. As consumers reassess long-haul trips, they are shifting towards closer destinations. ROI respondents still favour ROI and mainland Europe, but half say they are now more likely to visit NI.