

Tourism Northern Ireland Consumer Sentiment Research

NI Market – Wave 18

November 2025

A scenic landscape of a lake at sunset. Three people are in a red canoe on the water. The sky is filled with dramatic, colorful clouds. The water reflects the sunset and the surrounding hills. A wooden pier is visible in the foreground on the left.

Research background



Research background & objectives

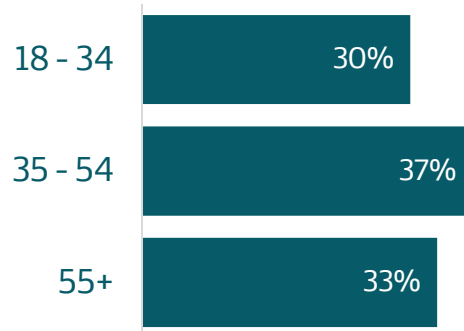
This is the 18th wave of our consumer sentiment research in Northern Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how things have changed throughout 2025.

Objectives:

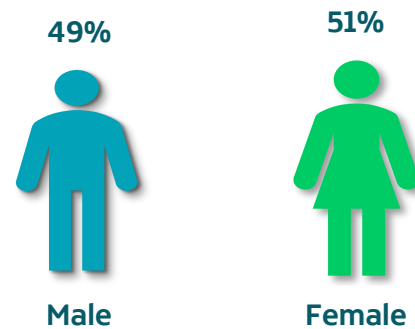
- Understand recent travel experiences in NI.
- Assess current attitudes towards travel in NI, ROI and further afield.
- Understand what impact cost of living increases and other broader factors are having on the above.

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

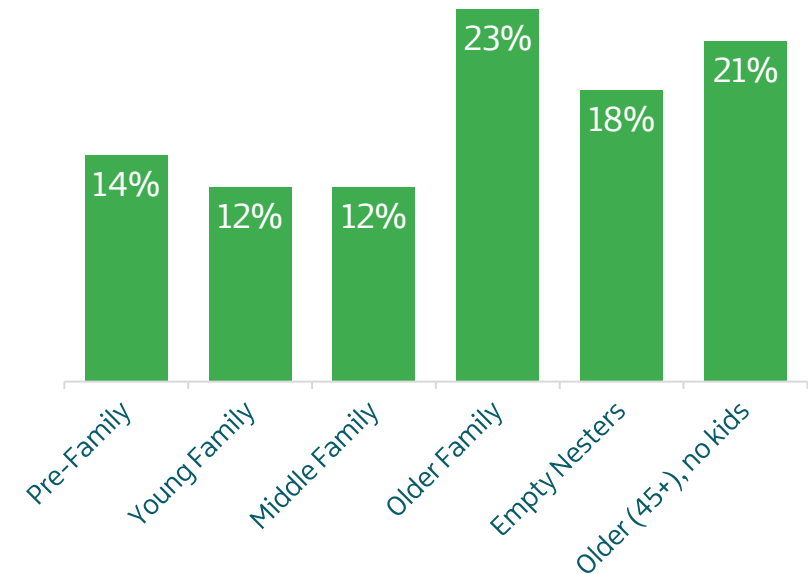
Age



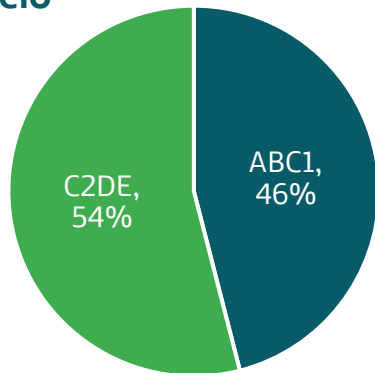
Gender



Lifestage



Socio



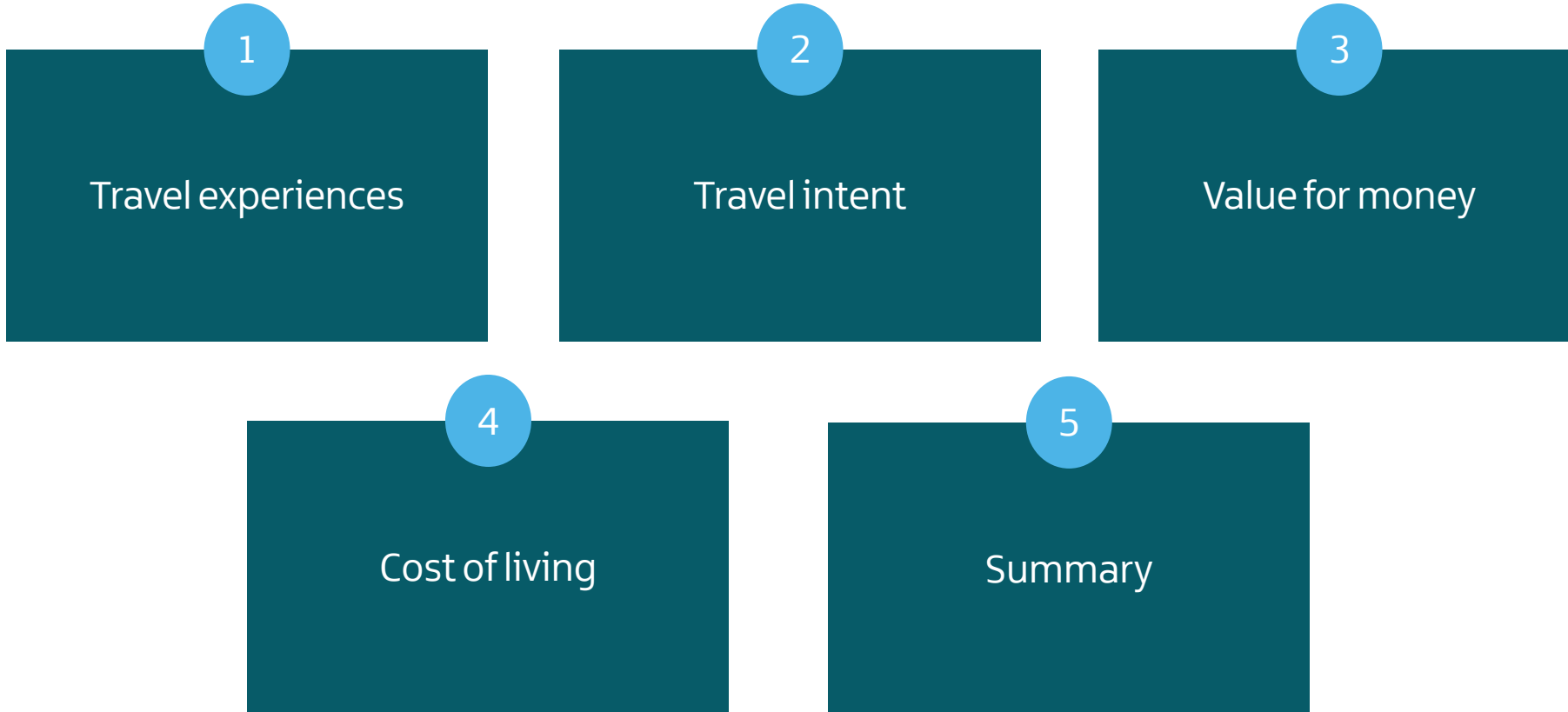
Region

Rest of NI 63%



Belfast / Greater
Belfast
37%

Contents





Travel experiences

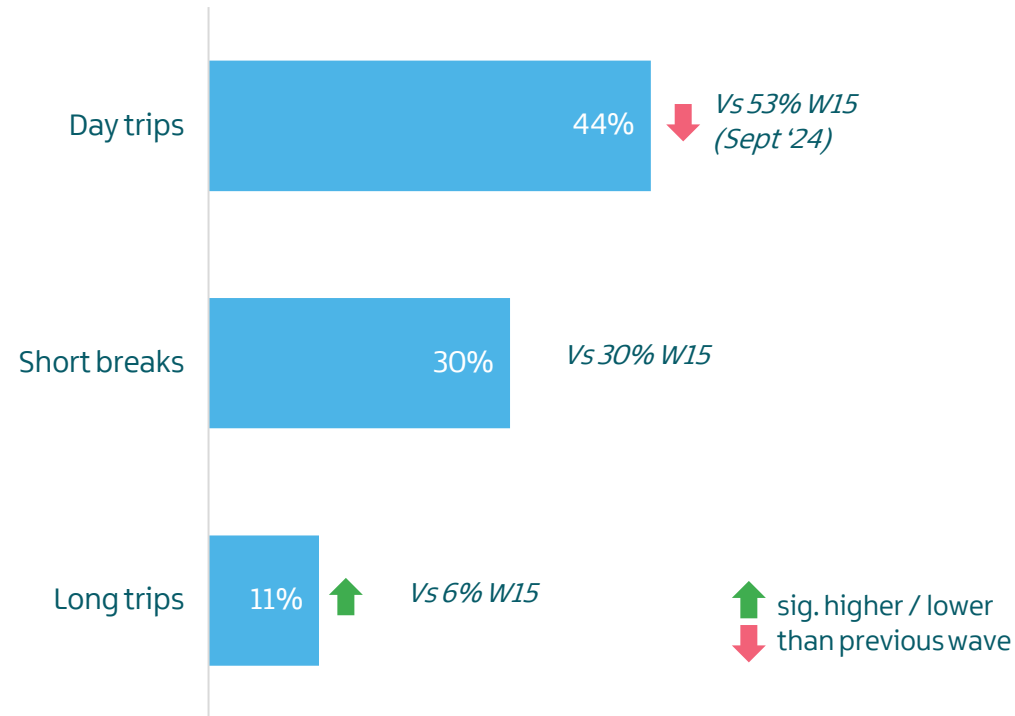
Largely stable for number taking an overnight NI domestic break, with a notable drop in NI day trips and fewer trips abroad

33%

have taken a **short or long break in NI** in 2025

Wave 15 (Sept 2024):
31%

% of total sample who took a trip in NI



Other than NI...

31%

took a break in ROI
Vs 36% in W15

40%

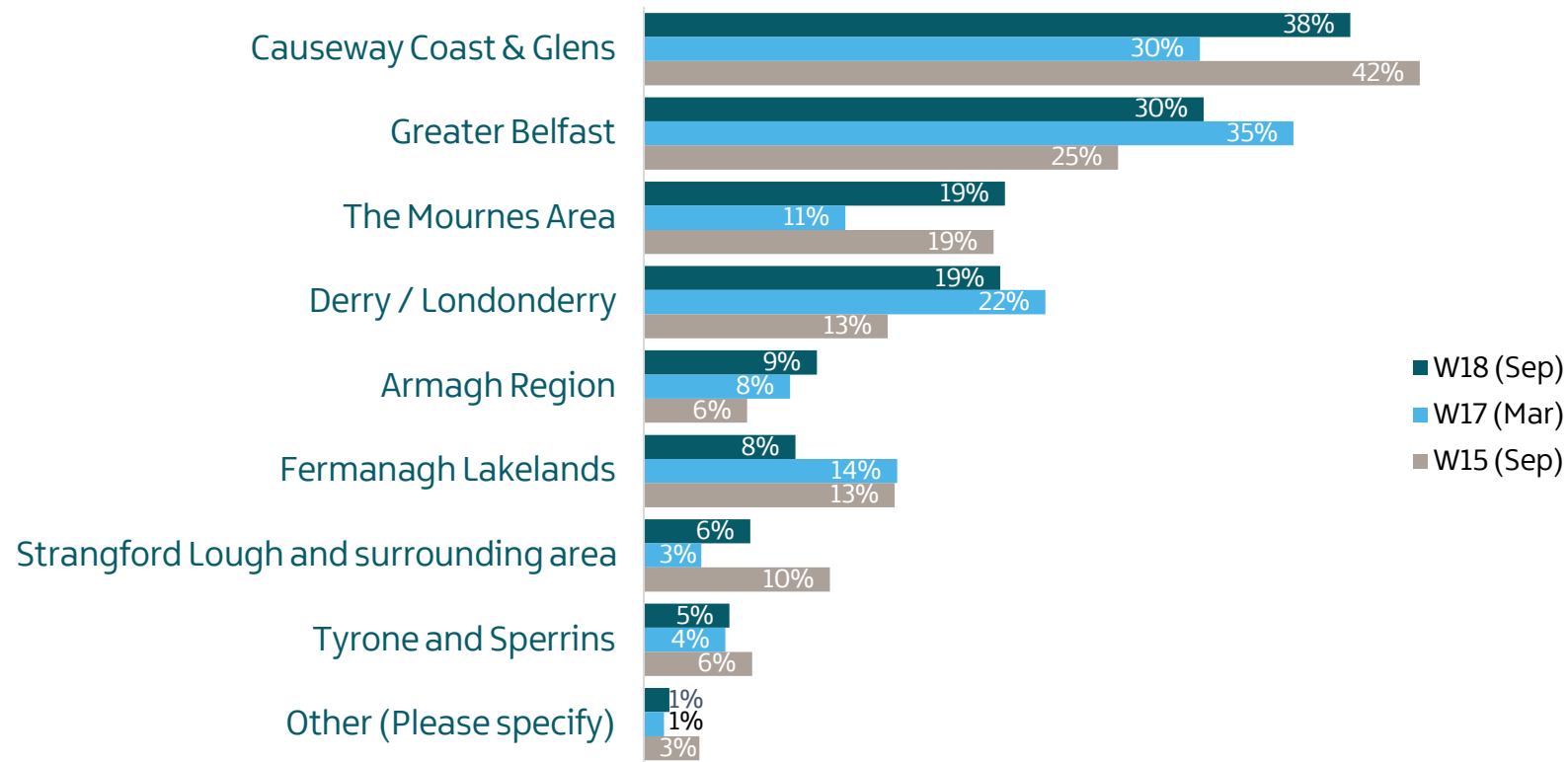
went abroad
Vs 48% in W15

30%

didn't travel at all
Vs 25% in W15

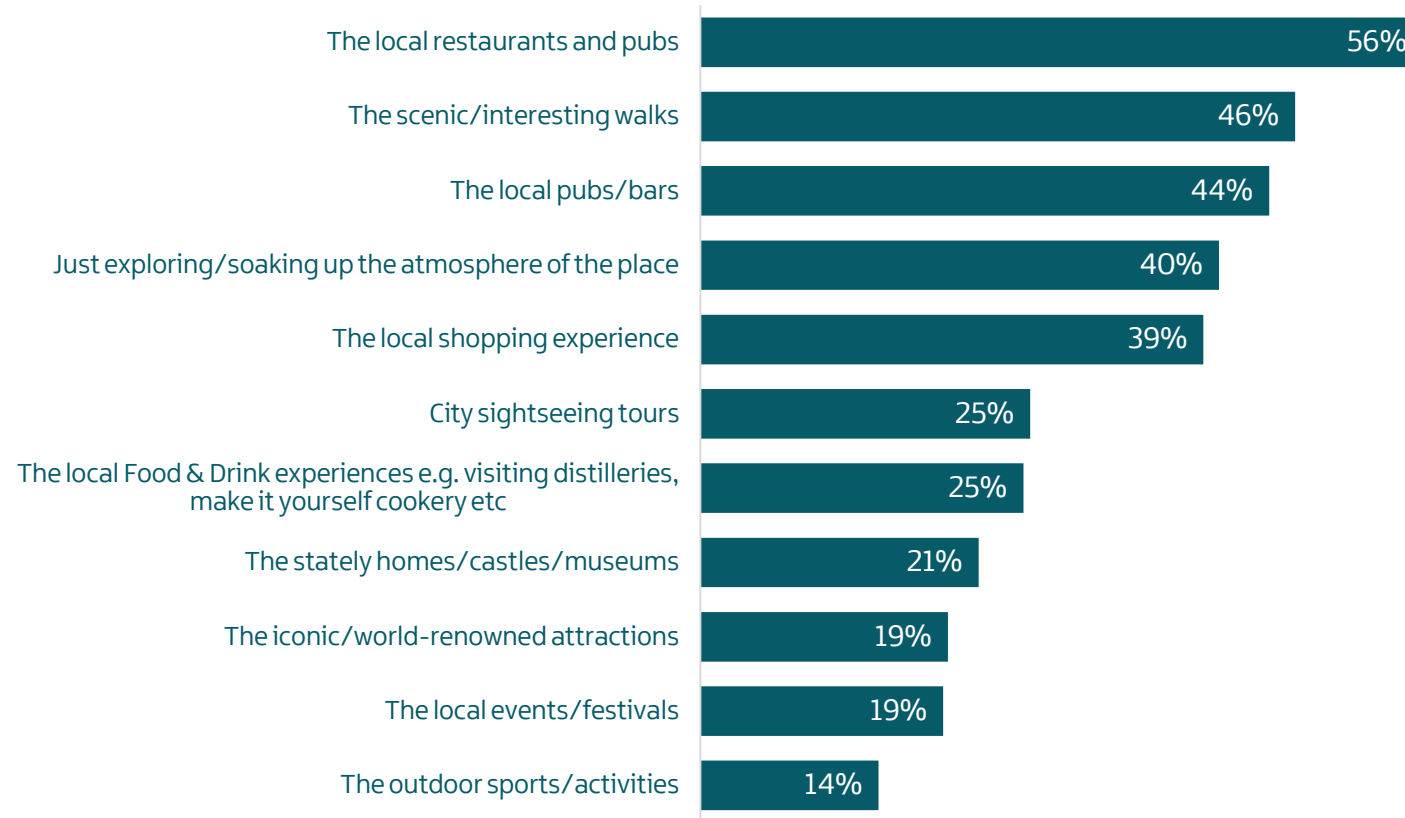
Causeway Coast & Glens returns as the top place to visit for those in NI

Where they visited in NI in 2025



Local restaurants and pubs and scenic/interesting walks were common experiences for visitors in 2025

What they did/ experienced in NI in 2024/ 2025



18 – 34-year-olds are more likely to have visited local food and drink experiences (33%)

Quality seekers are more likely to have visited local restaurants and pubs (69%)

All activities scored well, particularly scenic walks & stately homes, as well as iconic attractions & food and drink experiences

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

■ Good / Excellent ■ Neutral ■ Poor

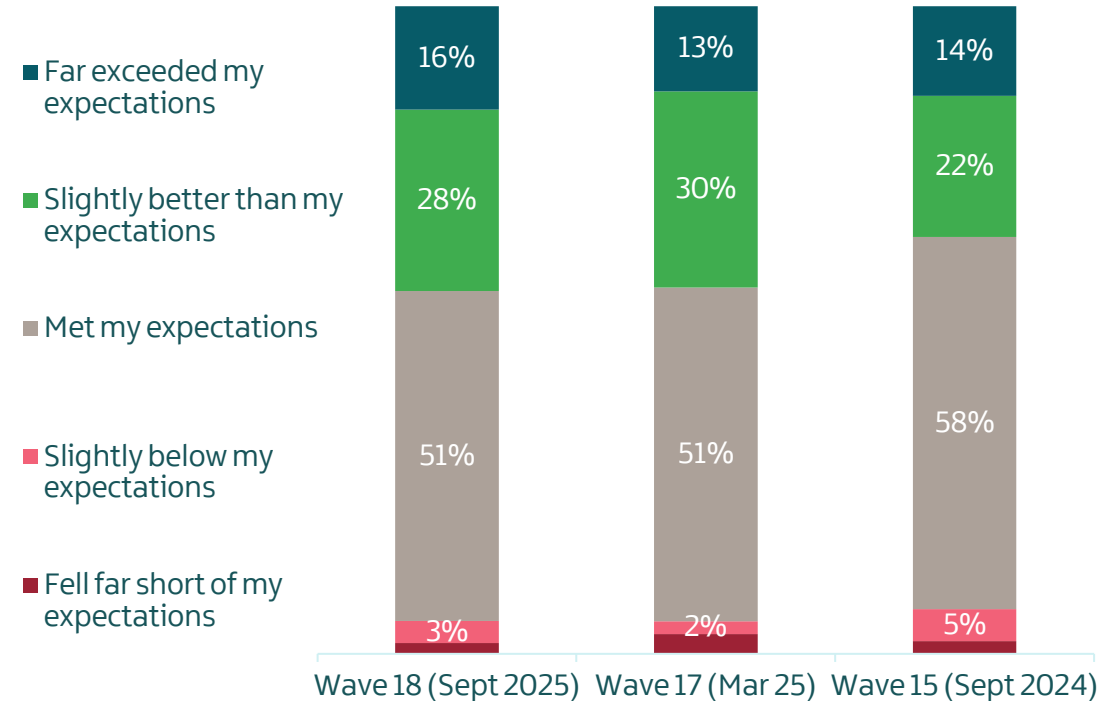


There is a directional increase of those saying that they have had their expectations exceeded

95%
had their
expectations met or
exceeded

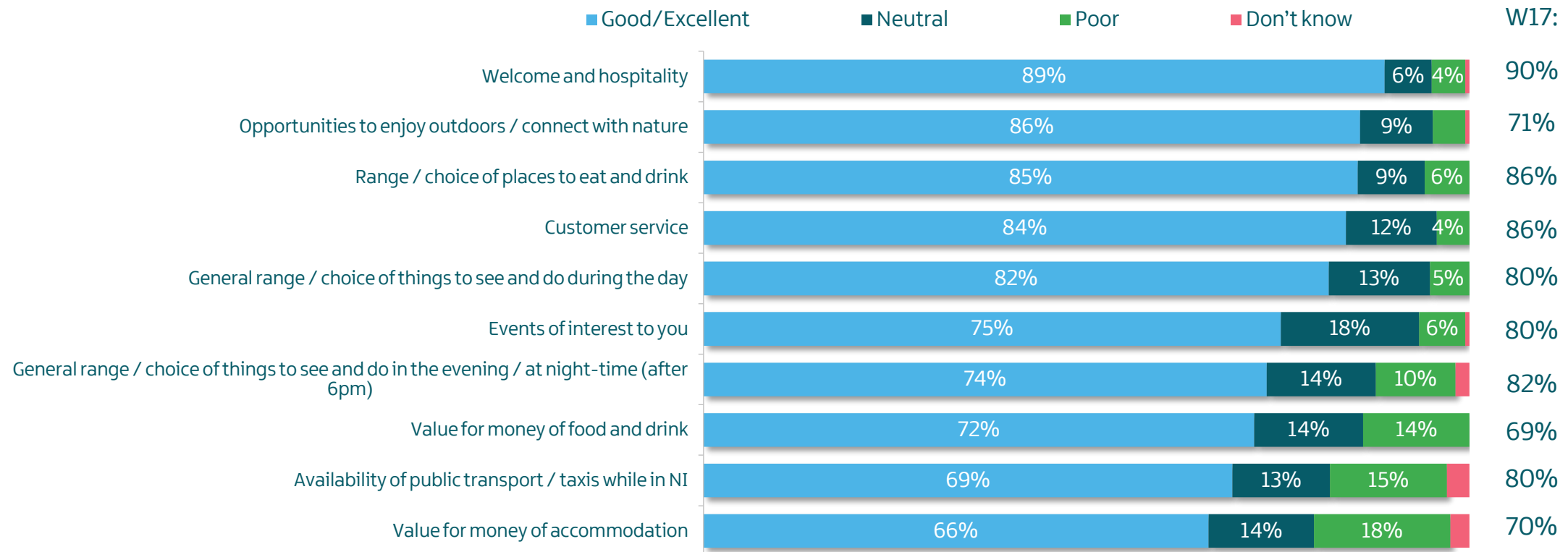
Vs 93% in
Wave 15
(September
2025)

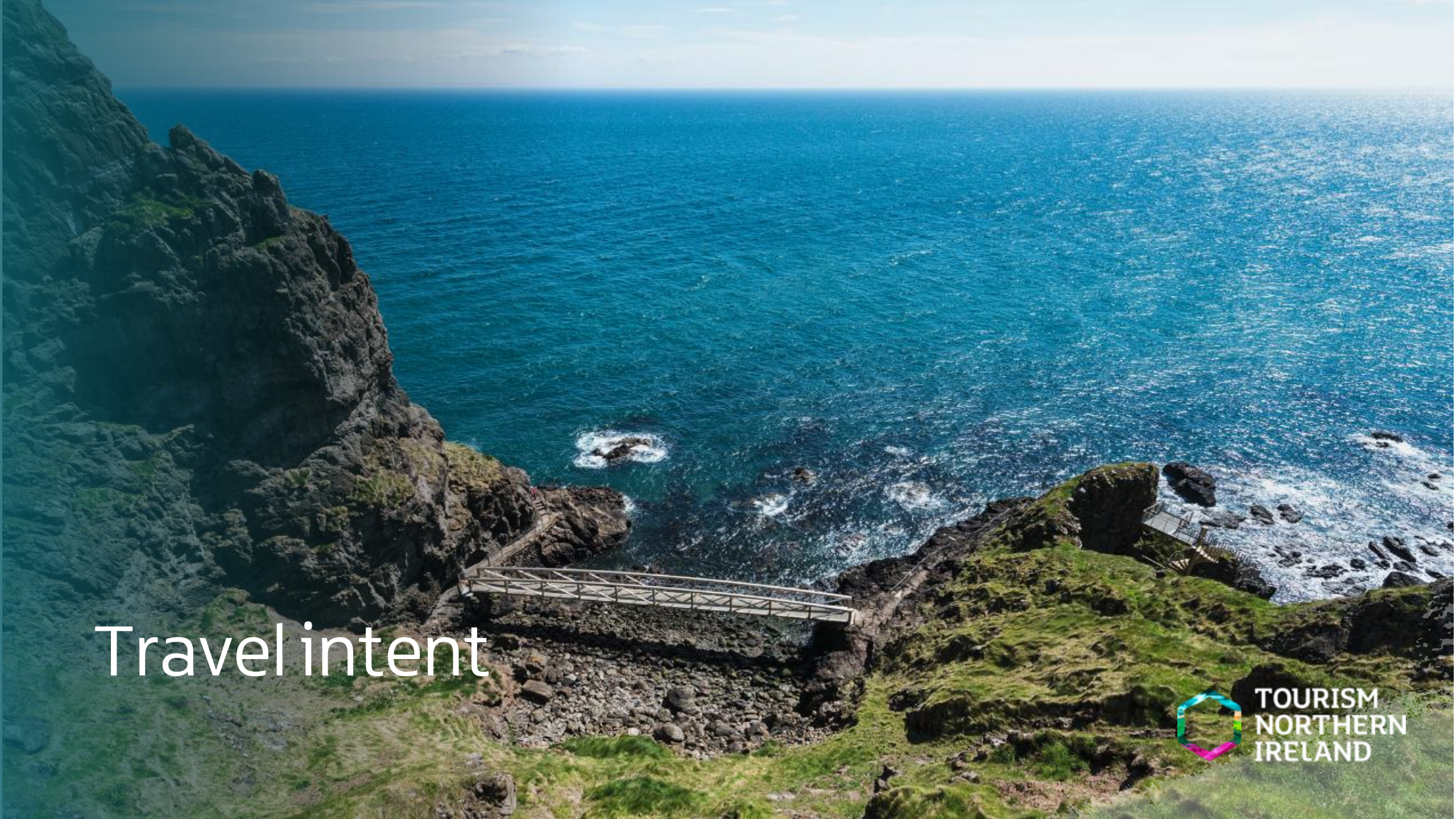
Those who visited NI felt their trip...



Rises in opportunities to enjoy outdoors, VFM of food and drink & range of things to see and do – slight decreases elsewhere

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



An aerial photograph of a rugged coastline. On the left, a steep, dark rock cliff rises from the sea. A wooden walkway with railings extends from the cliff edge down to a small, rocky beach. The beach is composed of dark, jagged rocks and is partially covered with green grass. The sea is a deep blue, with white foam from waves breaking against the rocks. In the distance, the horizon is visible under a clear sky.

Travel intent



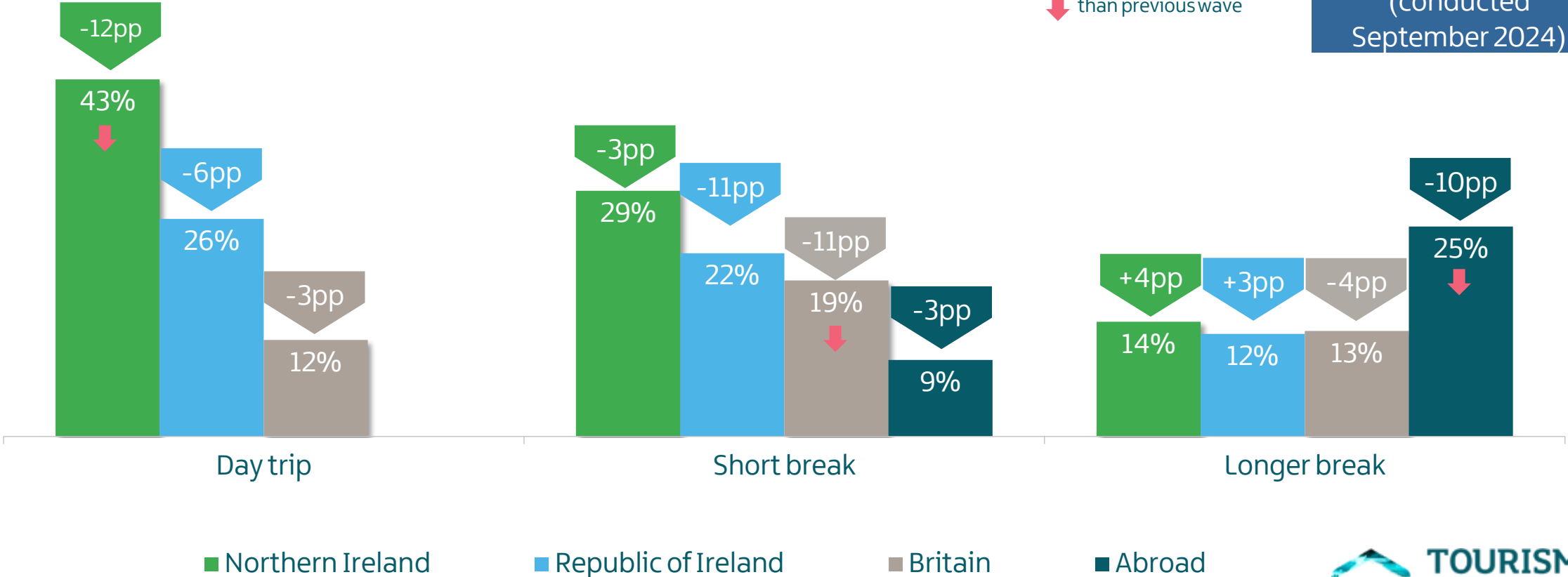
TOURISM
NORTHERN
IRELAND

Day trip and short break intentions within NI are down compared to last year, as are trips abroad

Intentions of taking a break in September – December

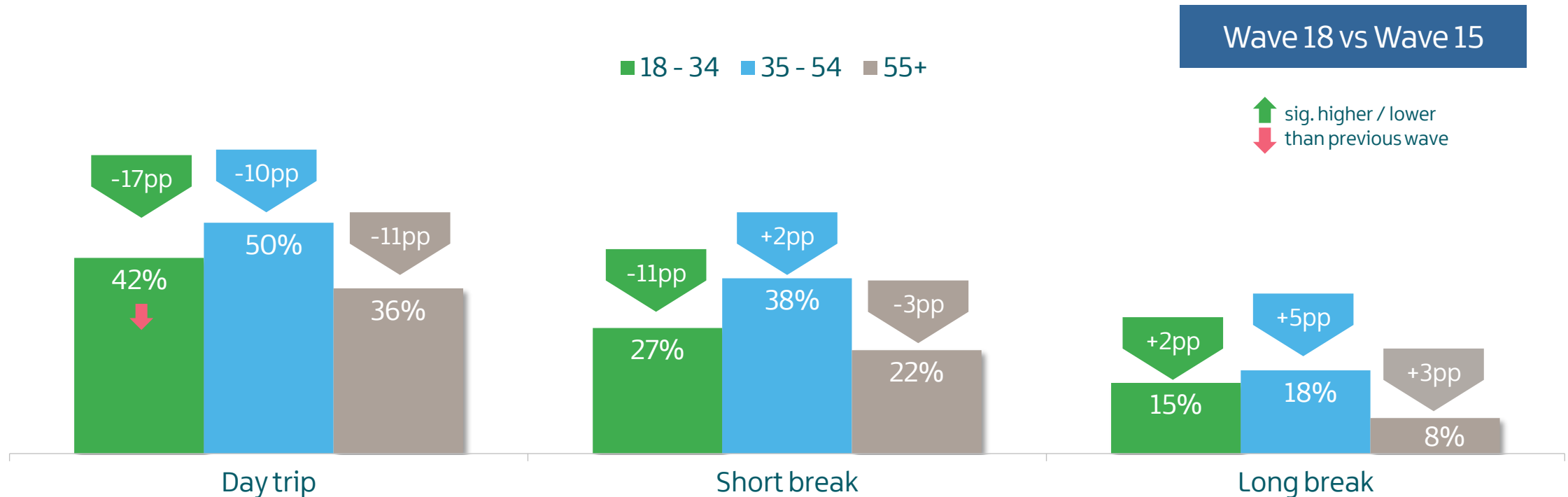
↑ sig. higher / lower
↓ than previous wave

Wave 18 vs Wave 15
(conducted
September 2024)



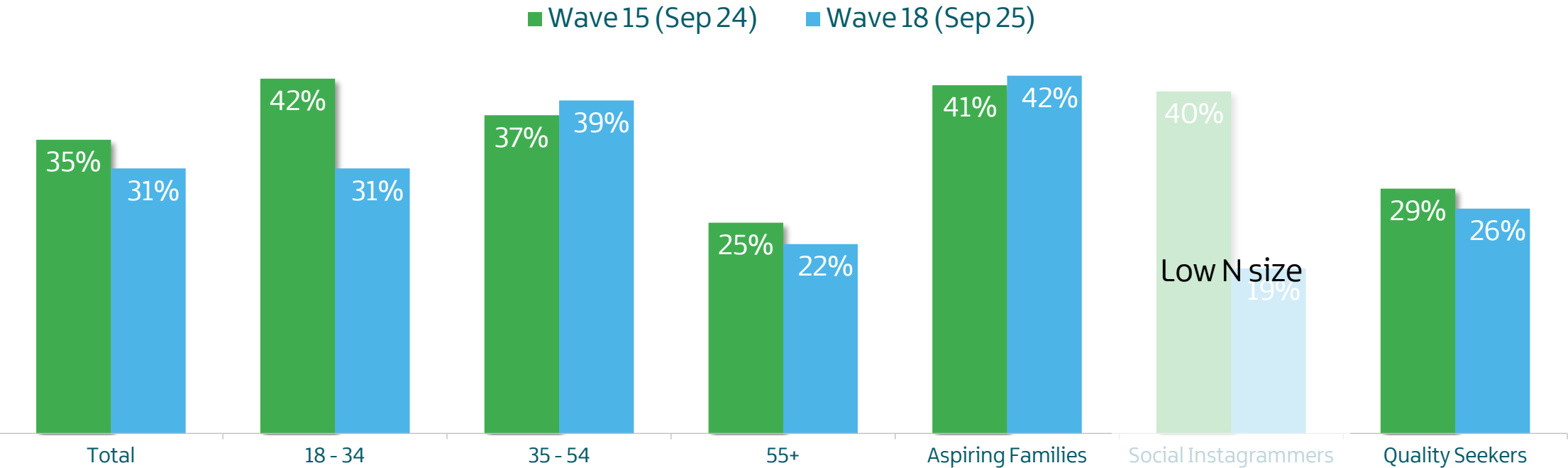
Short break intentions are generally down across the board, particularly for those aged 18 - 34

Trip intentions of taking a break in **NI** in the remainder of 2025



Notable drop in NI domestic short and long trip intentions combined vs this time last year

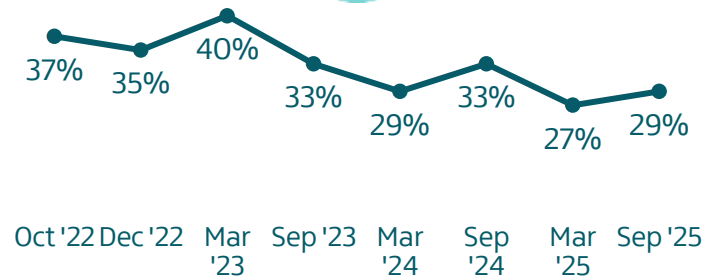
Intentions of taking a break in NI in the remainder of 2025 – Short and Long trips combined



Most are considering a short break in October, with 1 in 5 having already booked

29%

are considering a short break in NI in Sept-Dec



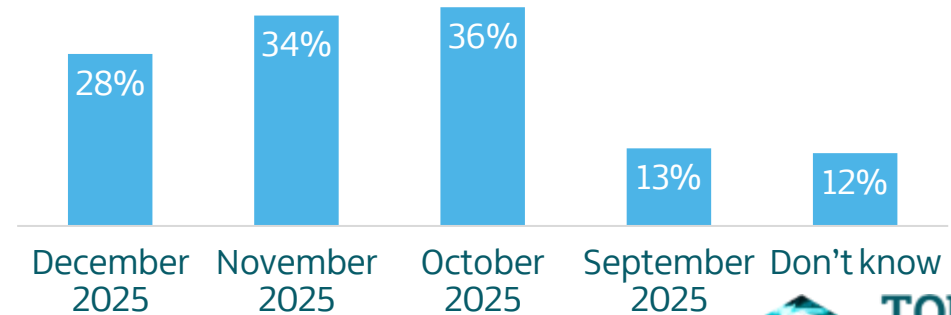
Status of short break – have they booked?

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



60% of considerers are actively planning or have booked a trip in NI – **18%** of the total sample

Short break planned for

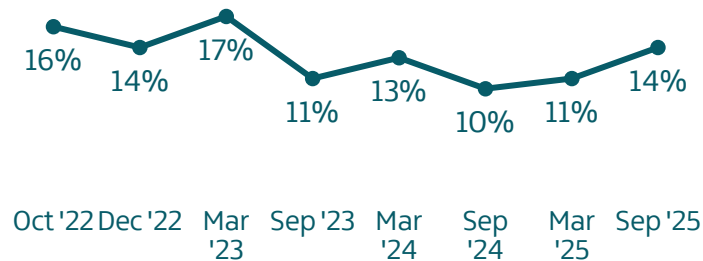


N = 400 / 118 considering short break / 71 planning a short break

Like short breaks, most people intend to travel for a long break during October

14%

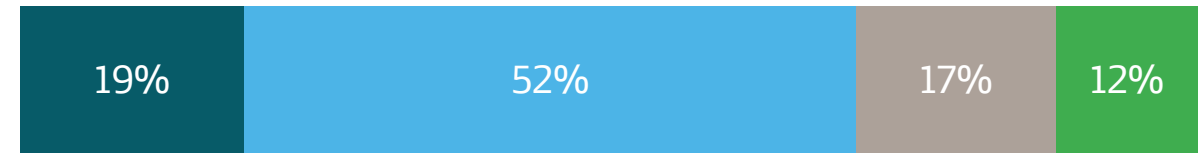
are considering a long break in NI in Sept-Dec



N = 400 / 55 considering long break / 39 planning long break (caution low N)

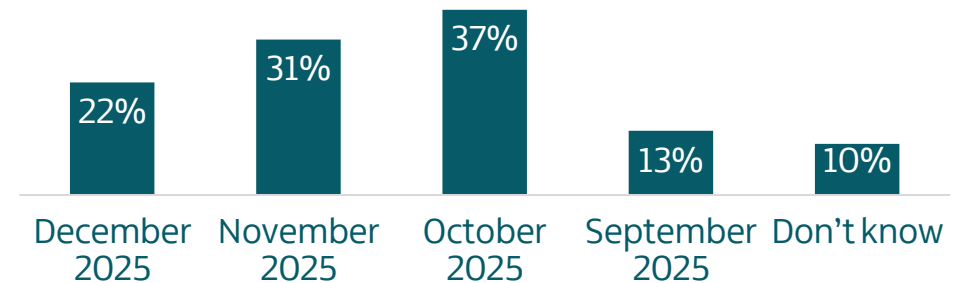
Status of long break – have they booked?

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



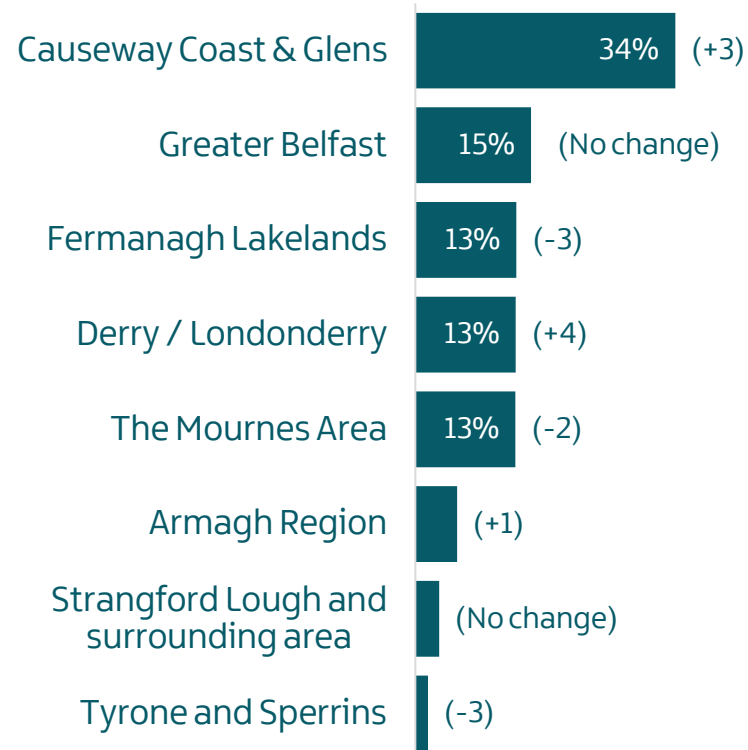
71% of considerers are actively planning or have booked a trip in NI – **10%** of the total sample

Long break planned for

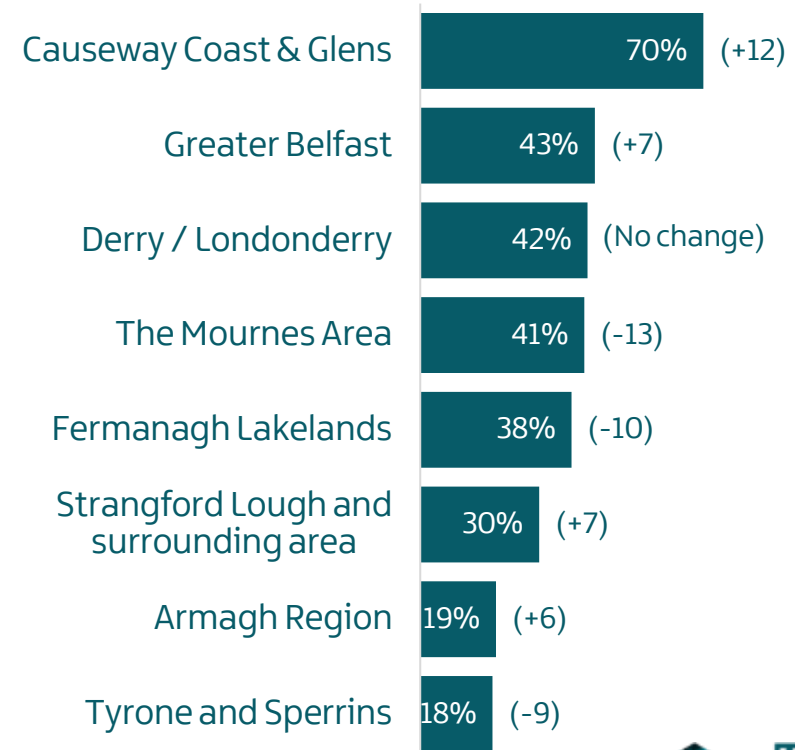


Causeway Coast & Glens continue to be the most considered location

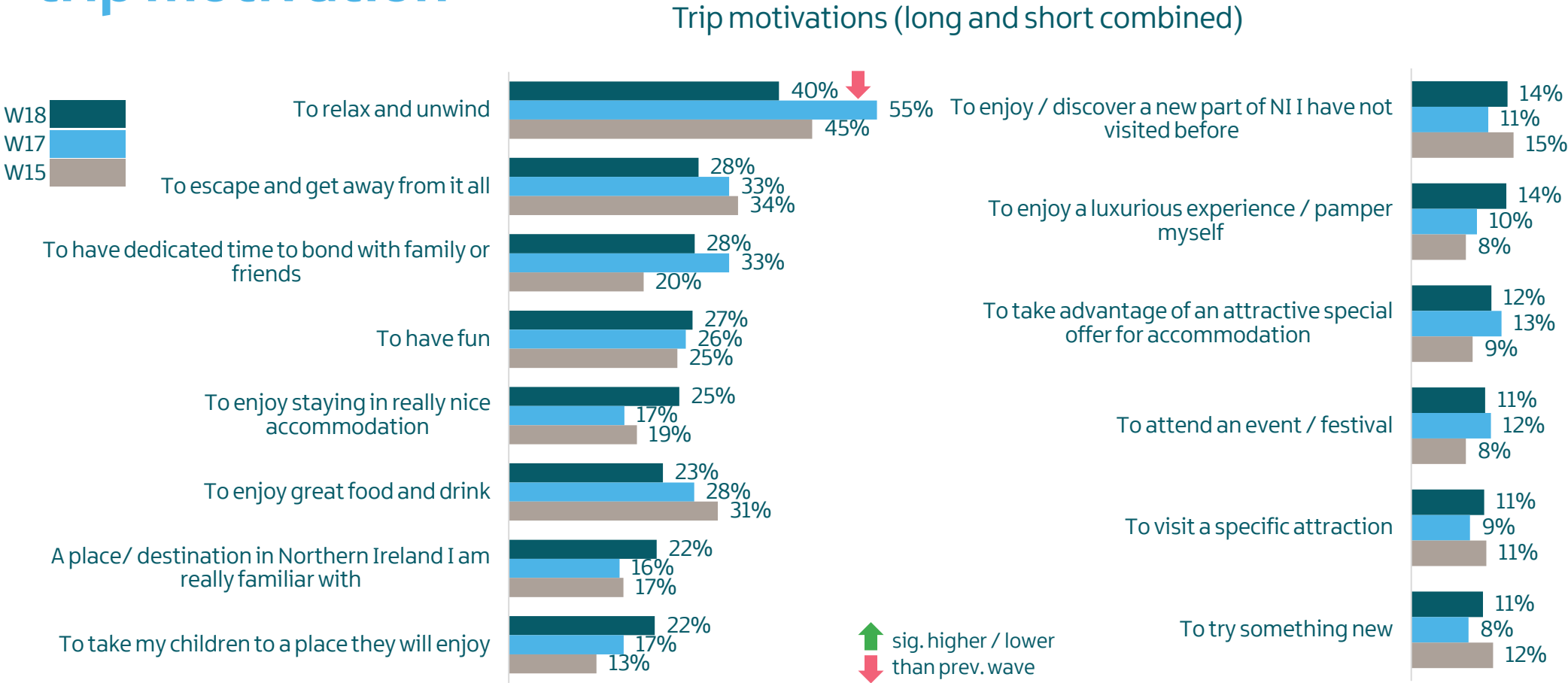
Destinations selected as no. 1 consideration for next trip (vs March)



Destinations in top 3 consideration for next trip (vs March)

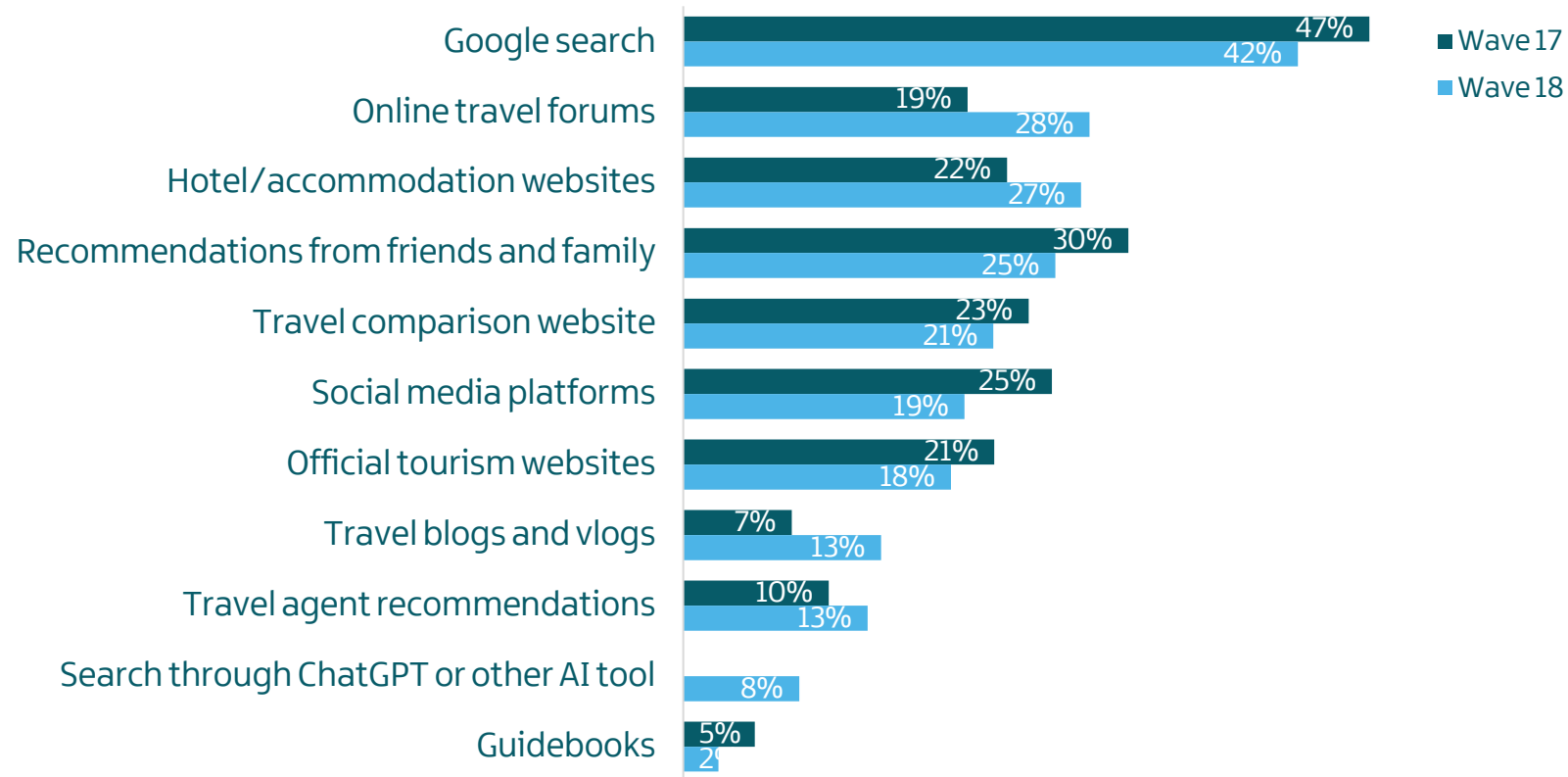


Although relaxation has decreased from March, it remains the top trip motivation



Google is by far the main way to research their trip, and nearly 1 in 10 are using AI tools

How they plan to research their trip

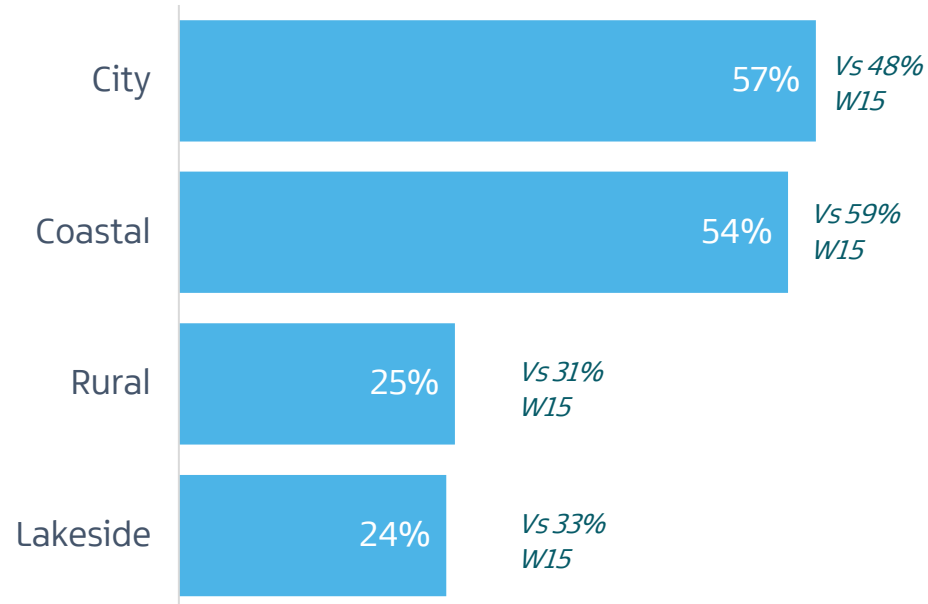


Booking.com is the main choice of comparison site – 56% doing research on this site. 19% are doing research on Trivago

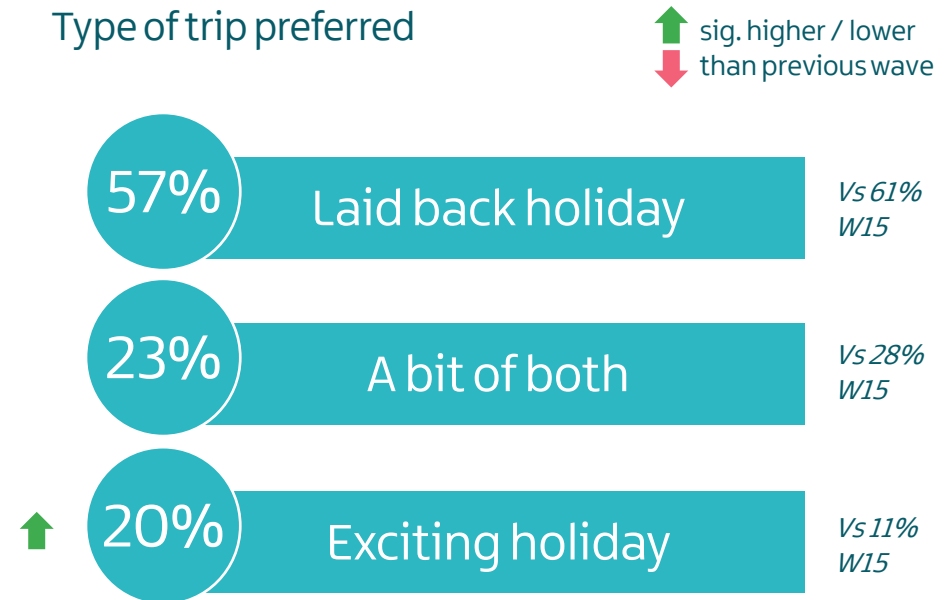
N = 109 planning long or short break (excl. “may or may not plan”)

More people are searching for an exciting holiday vs this time last year

Type of break preferred



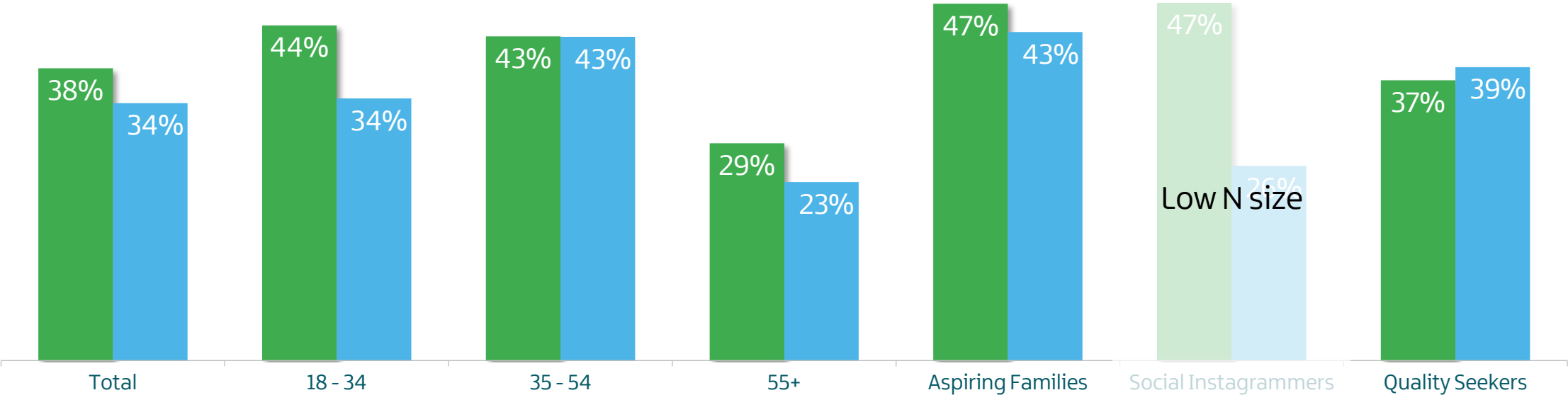
Type of trip preferred



Combined short and long trip intentions for early 2026 show a slight decline vs this time last year

Intentions of taking a break in winter / spring 2026 in NI - Short and Long trips combined

■ Wave 15 (Sep 24) ■ Wave 18 (Sep 25)



N = 400

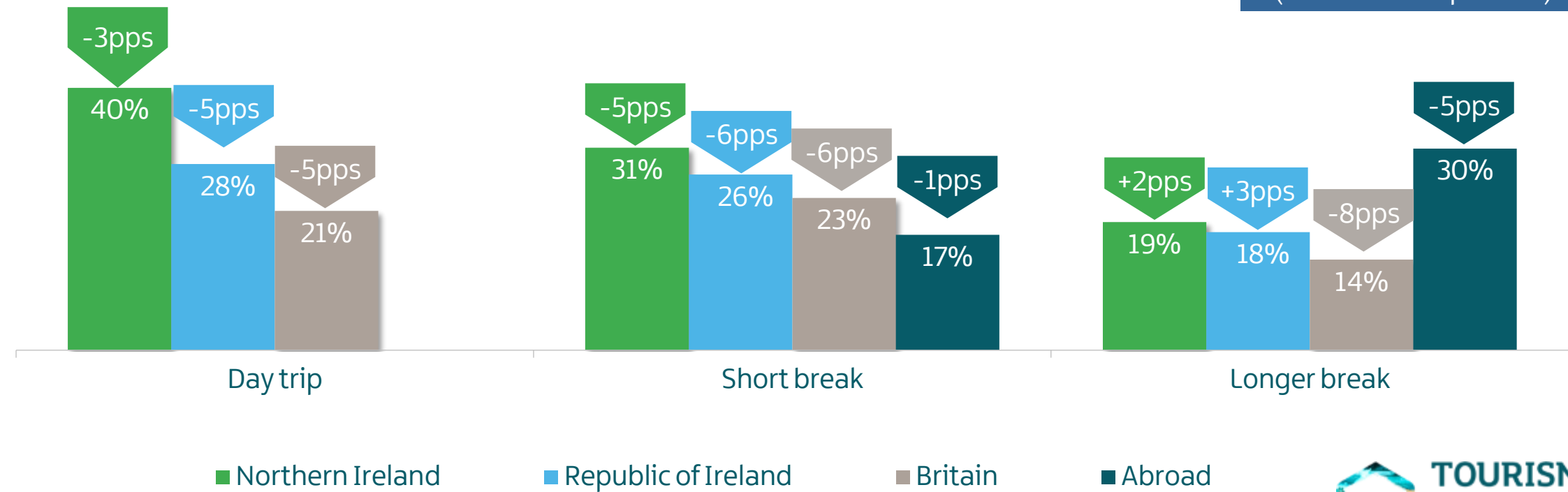


E24b. Would you consider taking a short break of at least 1-3 nights in Northern Ireland in winter/spring 2026 (January to April)? E24d. Would you consider taking a longer break of at least 4 or more nights in Northern Ireland in winter/spring 2026 (January to April)?

Trip intentions for early 2026 are generally down vs this time last year for closer to home locations and abroad

Intentions of taking a break in winter / spring 2026

Wave 18 vs Wave 15
(conducted Sept 2024)



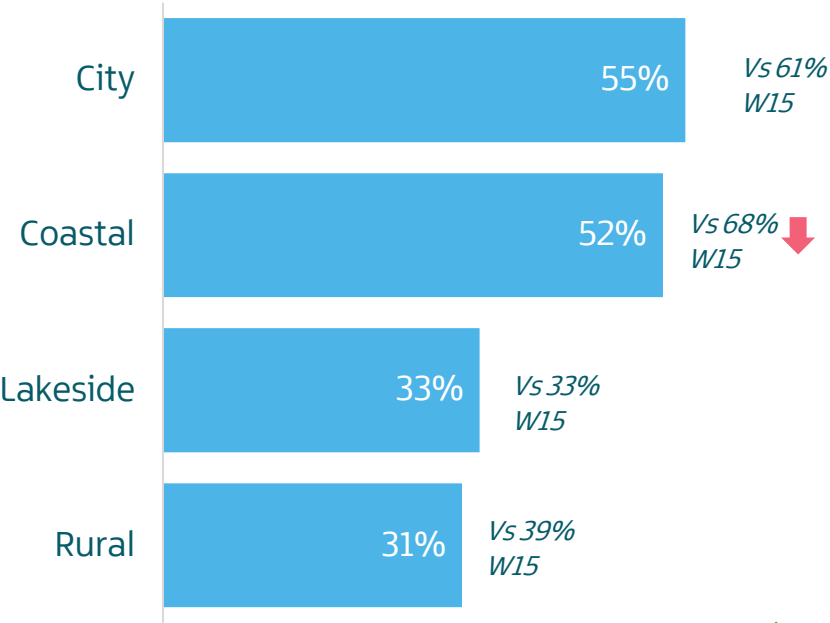
N = 400



E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain winter / spring 2026 (Jan - April)? 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 winter/spring 2026 (January to April)? 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 in winter/spring 2026 (January to April)?

Fewer people are considering a break along the coast in 2026

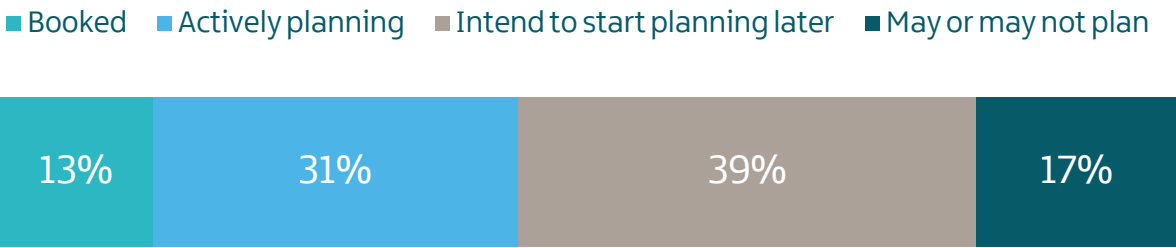
Type of break considered



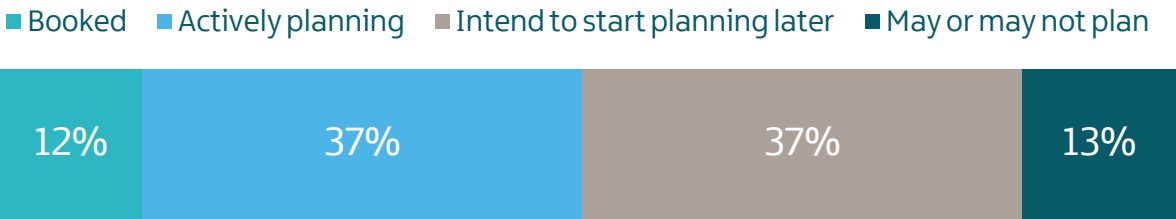
N = 135 considering long or short break in early 2025

↑ sig. higher / lower
↓ than previous wave

Amount of short break planned



Amount of long break planned



Of those who have planned a trip abroad, most will go in March / April

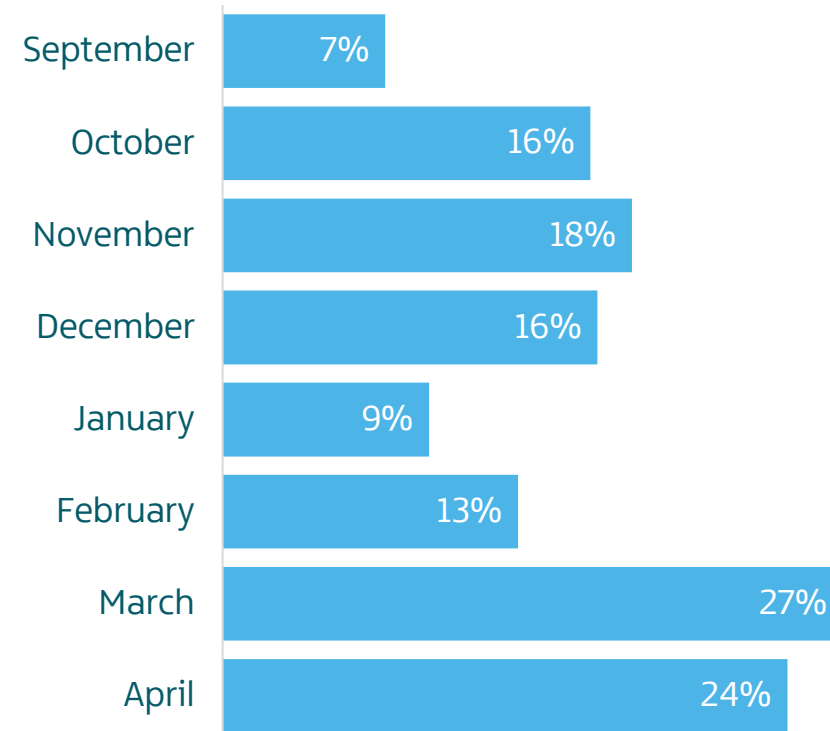
40%

of total sample are considering a break abroad in the next 6 months
(vs. 49% W15)

60%

of this cohort are actively planning or have booked their trips
(vs. 63% W15)

When trips abroad are planned for



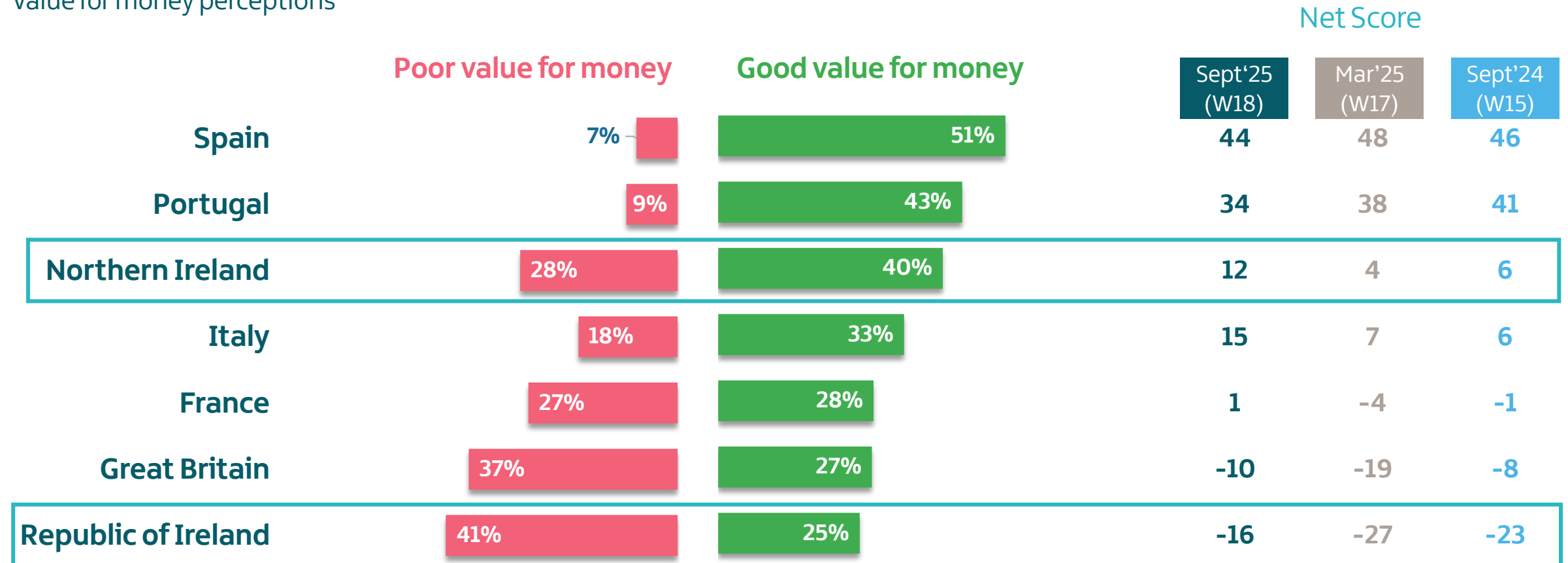
N = 400 (total) / 162 considering trip abroad

A photograph of two women sitting at a table outdoors at night, eating and talking. They are wearing warm winter jackets. The table is set with plates of food, glasses of water, and condiment containers. The scene is lit by warm, low-key lighting, possibly from a fire or lanterns, creating a cozy atmosphere. The background is dark and out of focus.

Value for money

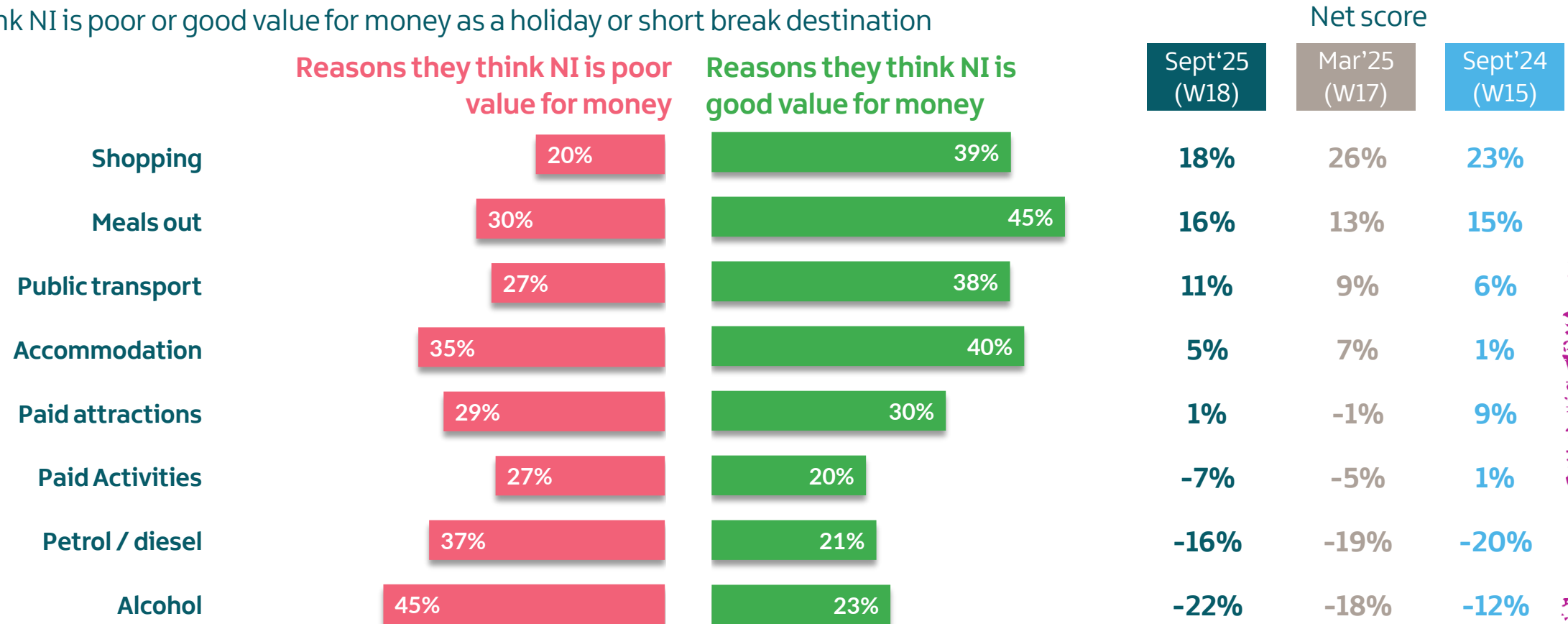
VFM in NI continues to rise, showing a 6pp increase YOY

Value for money perceptions



Net VFM continues to rise YOY for public transport and accommodation

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

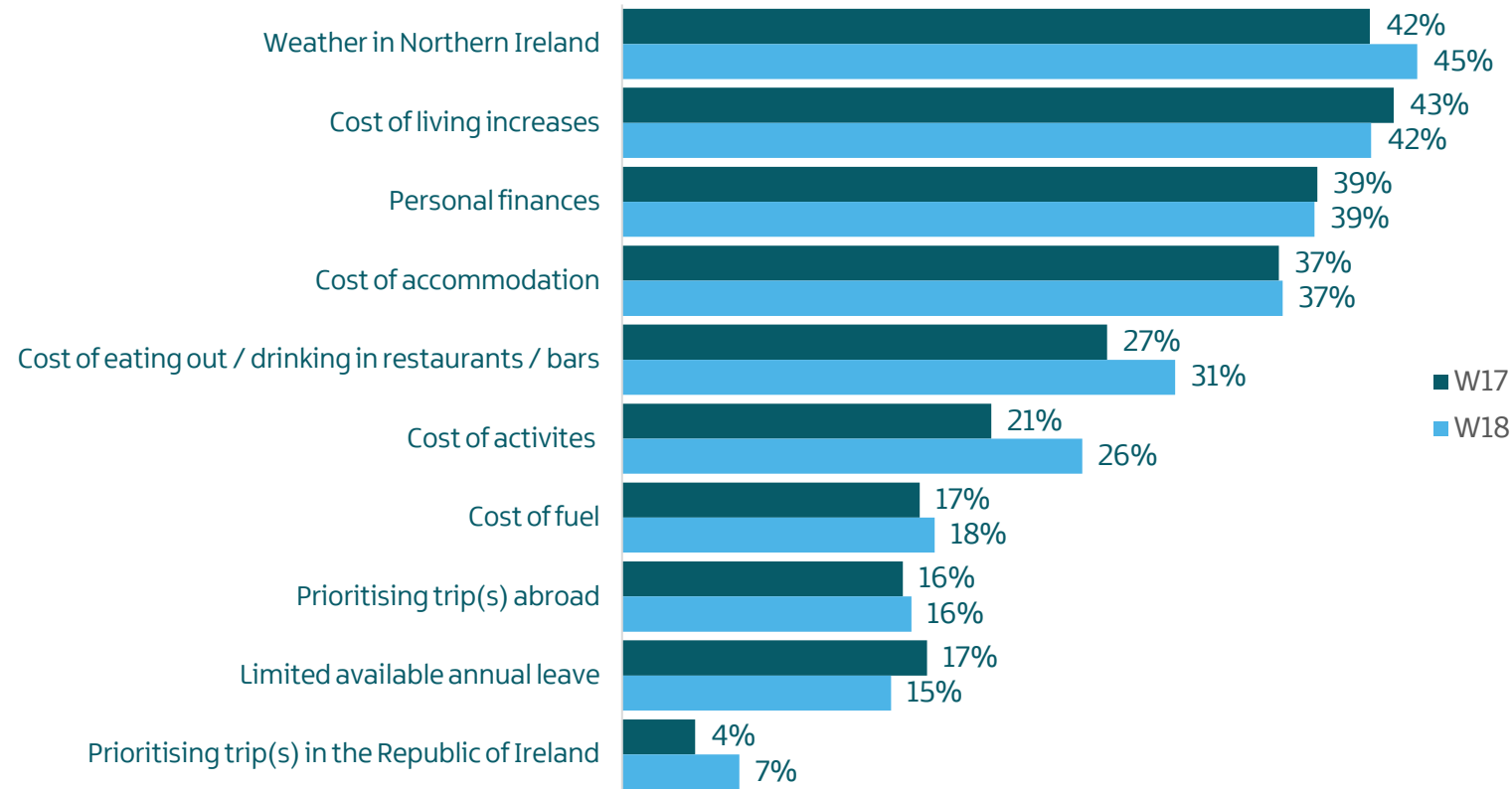




Cost of living

The weather and cost of living continue to be the main barriers to travel in NI

What could stop them taking a break in NI

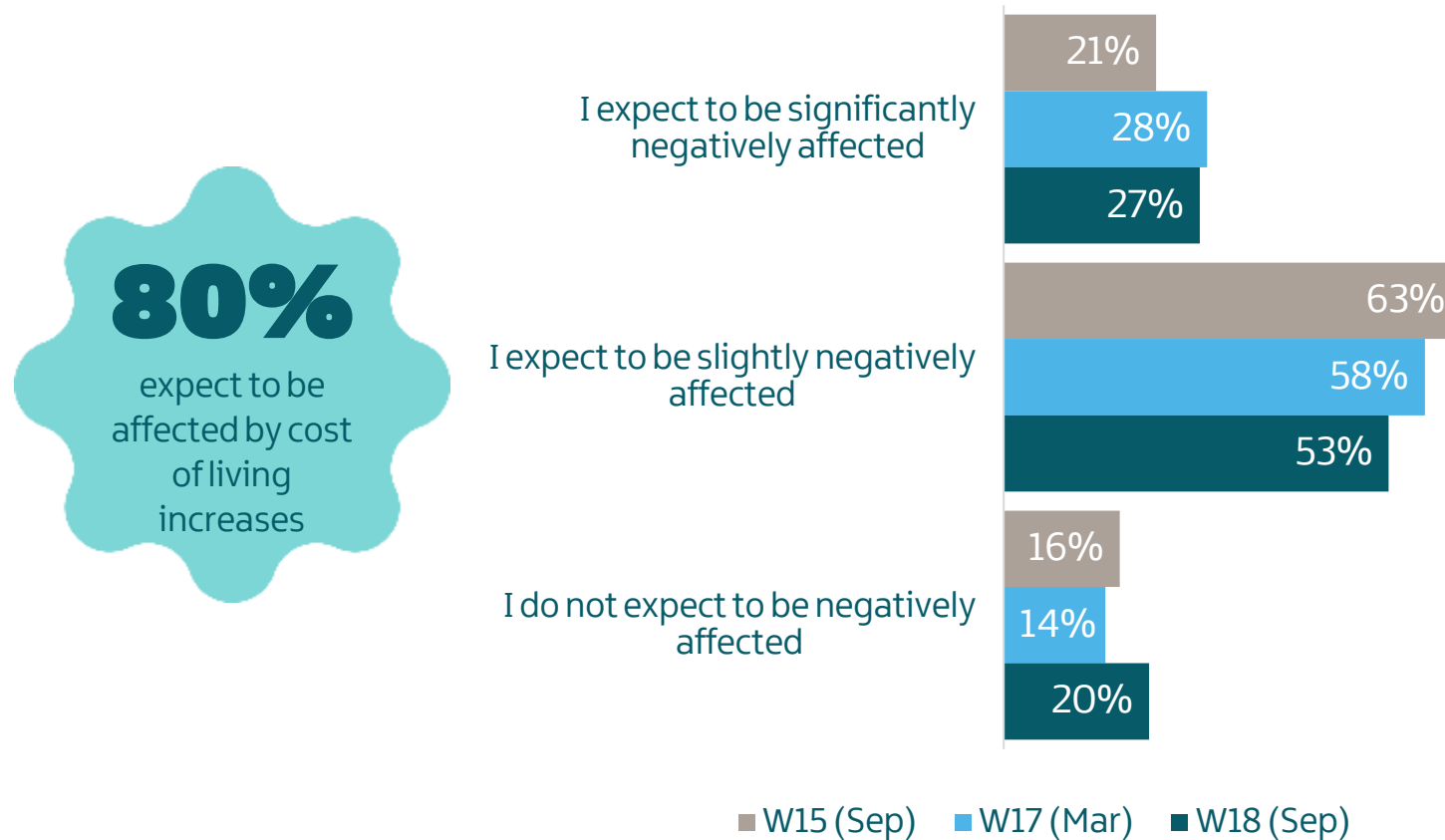


Those aged 18 – 34
are most likely to say the cost
of activities is a barrier (34%)

Older families more likely to
say that the cost of eating out
is a barrier (46%)

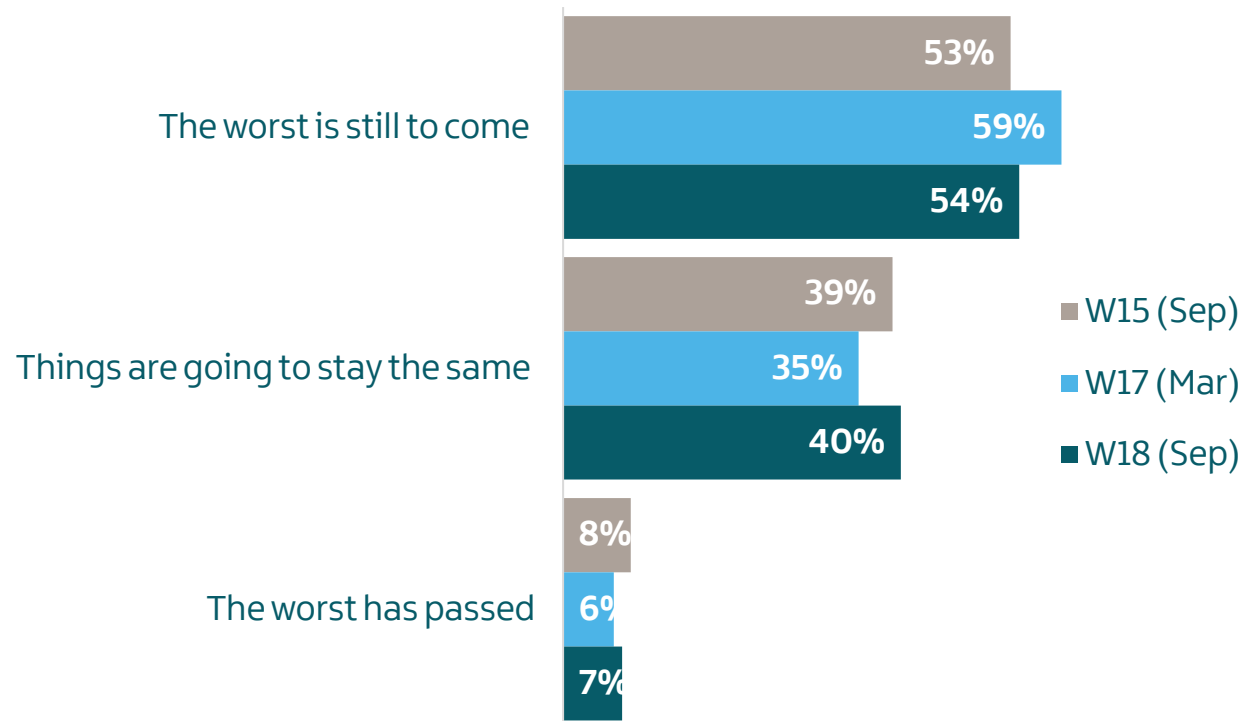
4 in 5 people expect to be negatively affected by the cost-of-living increases – slightly lower than in 2024

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

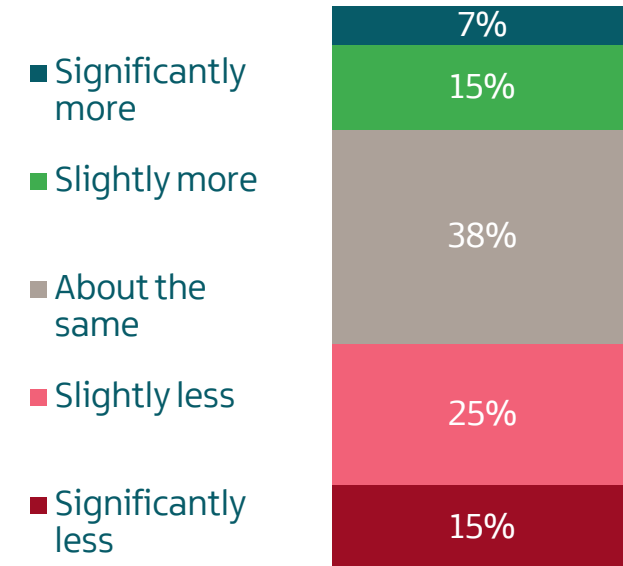


Over half say that the worst is yet to come. Two-fifths reporting a drop in disposal income for holidays

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



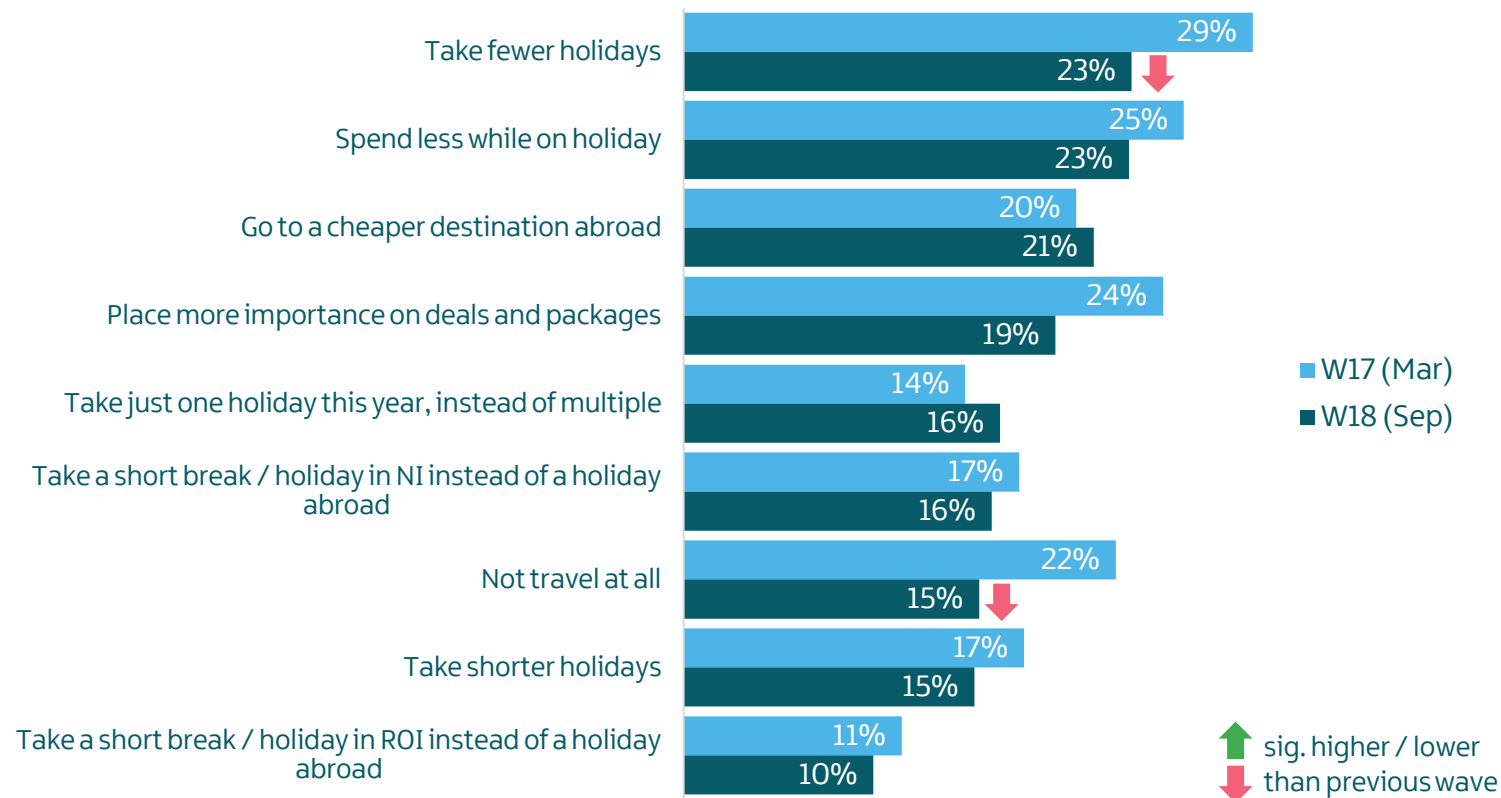
How disposable income to spend on activities / holidays has changed



N = 400

There is a reduction in those saying they will take fewer trips or not travel at all

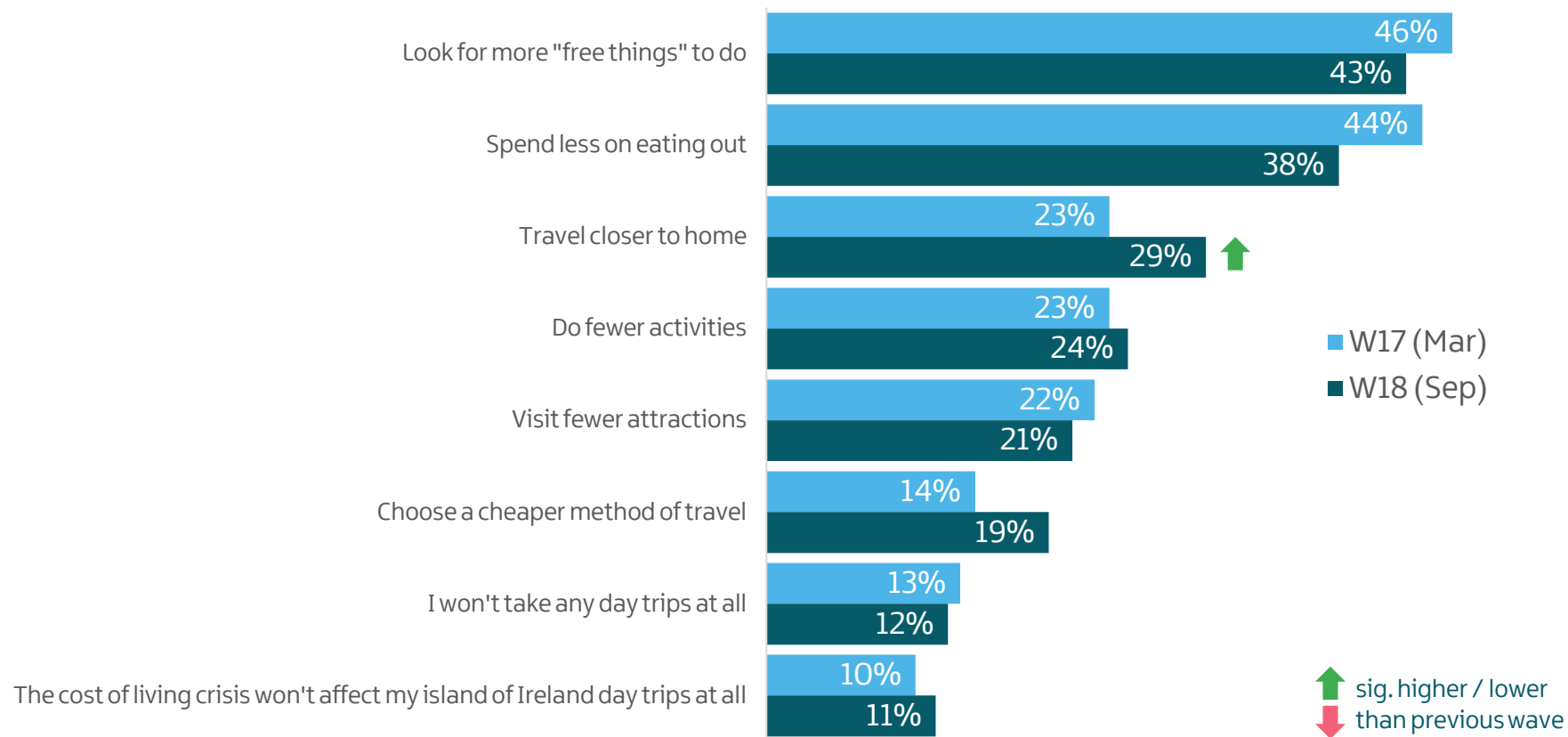
Things people are more likely to do in relation to short breaks/holidays compared to this time last year



35 – 54 are more likely to take a short holiday in NI instead of going abroad (26%)

More people this wave are saying they will travel closer to home

Things people consider doing as a result of cost of living crisis when taking a day trip in NI



55+ say they are more likely not to take any day trips at all (23%).

18-34 years olds say they are more likely to look for more free things to do (51%)

Summary

Summary

Satisfaction with NI breaks remain high

- The number of NI residents who took either a long or short domestic break during the first nine months of the year is largely stable compared with the same period in 2024, with a notable drop in NI day trips and fewer trips abroad.
- Satisfaction with recent NI trips remains strong for domestic consumers. The welcome and hospitality, opportunities to enjoy the outdoors and the choice of places to eat & drink were particularly highly rated.

Trip intentions showing a general decline

- Looking ahead to the last quarter of the year and early 2026, domestic holiday break intentions have dipped slightly, with intentions for short breaks in ROI over the next six months also down.
- While competition from abroad remains strong, there has been a decline in the number of NI consumers considering taking a break abroad in the next six months.
- Key motivations for taking an NI break continue to centre around relaxation and escapism. For consumers in both markets, opportunities for fun, enjoying good food and drink and the appeal of staying in quality accommodation remain strong drivers.

Value for money still perceived as positive

- Domestic continue to view NI as offering better value for money than ROI and GB, with shopping particularly likely to be perceived as offering good value for money.

Cost of living remains on consumers' minds

- The rising cost of living continues to affect the majority of NI consumers. The number expecting to be negatively impacted in the coming months remains stable compared with earlier in the year, but two-fifths of NI consumers report a drop in disposal income for holidays.
- For NI consumers, the increased cost of living and concerns over personal finances are key barriers for taking a domestic trip over the next six months.