

Tourism Northern Ireland Consumer Sentiment Research

ROI Market – Wave 18

November 2025



TOURISM
NORTHERN
IRELAND



Research background

Research background & objectives

This is the 18th wave of our consumer sentiment research in the Republic of 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.

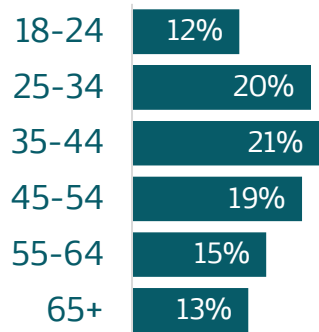
Objectives:

- 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.

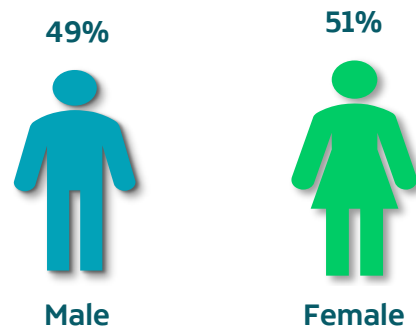


Sample - We spoke to a robust, nationally representative sample in the Republic of Ireland

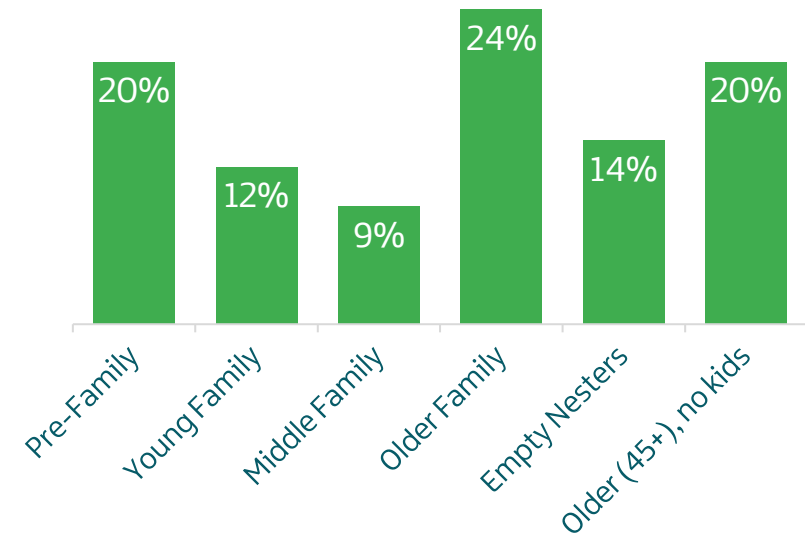
Age



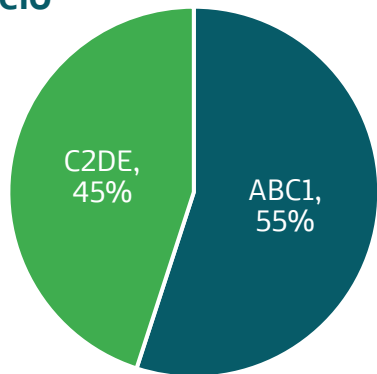
Gender



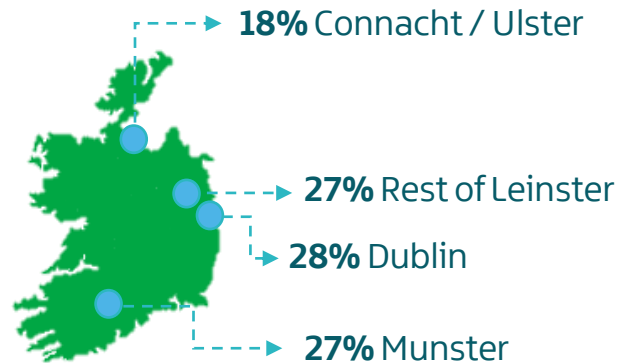
Lifestage



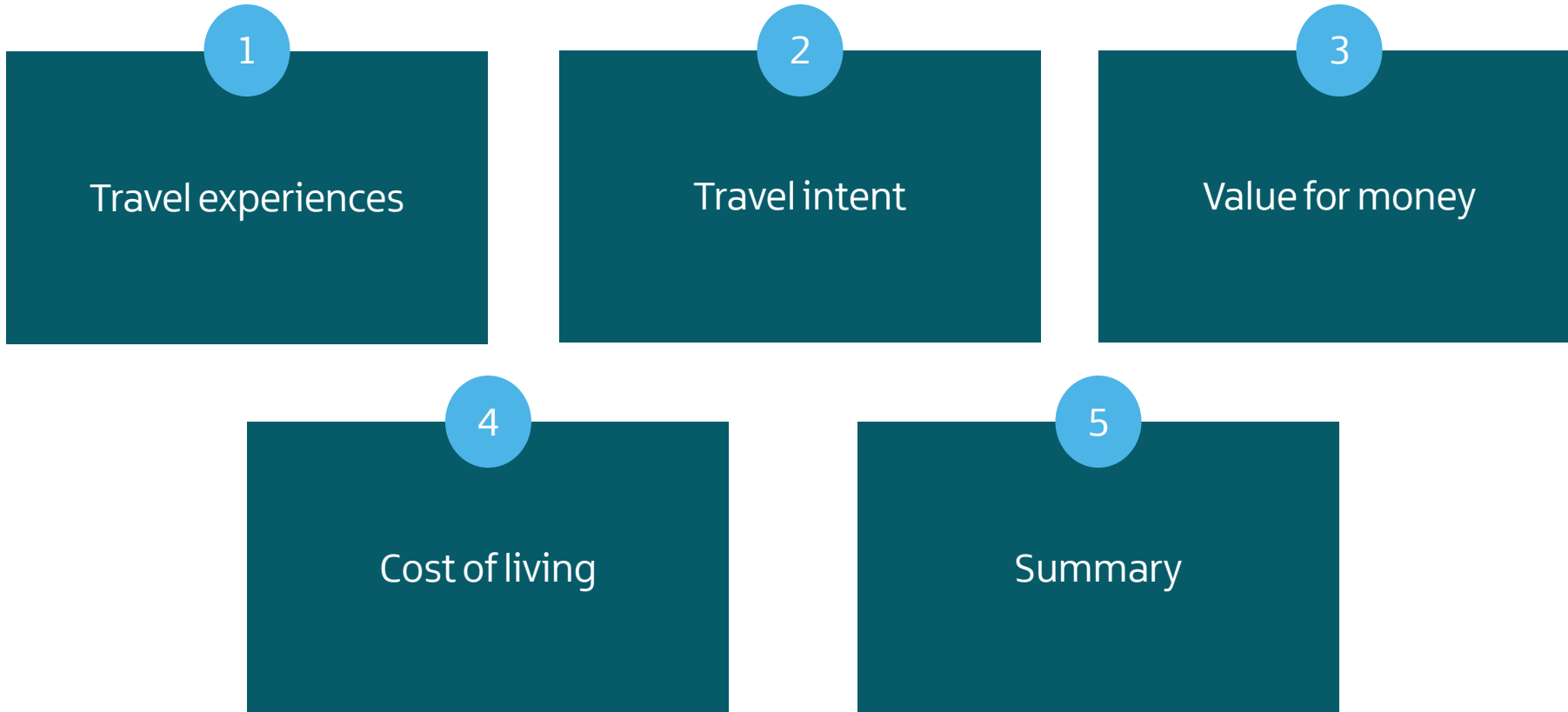
Socio



Region



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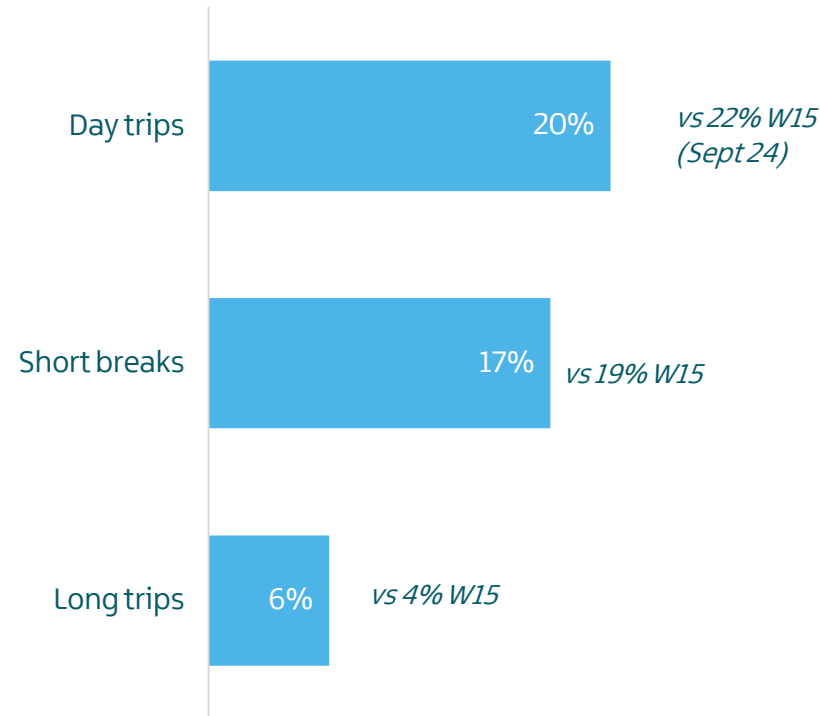
Travel experiences

A general reduction in breaks overall in 2025, with a notable drop in those taking a domestic break within ROI

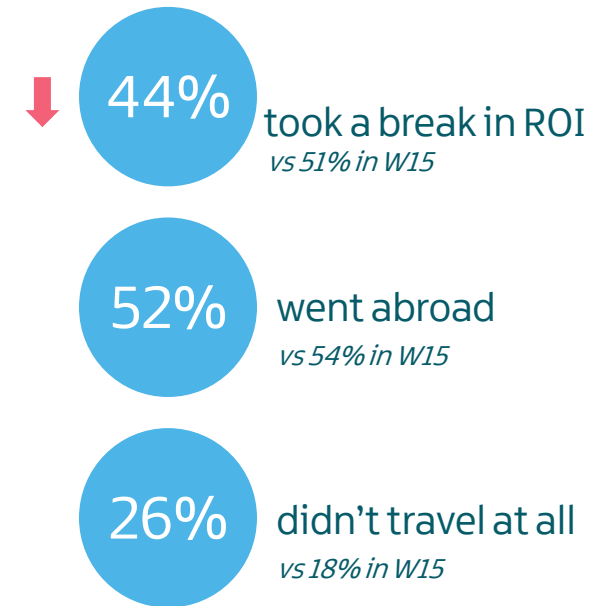
20%
 have taken a **short or long break to NI** in 2025

Wave 15 (Sept 2024): 21%

% of total sample who took a trip to NI



Other than NI...



↑ sig. higher / lower than previous wave
 ↓



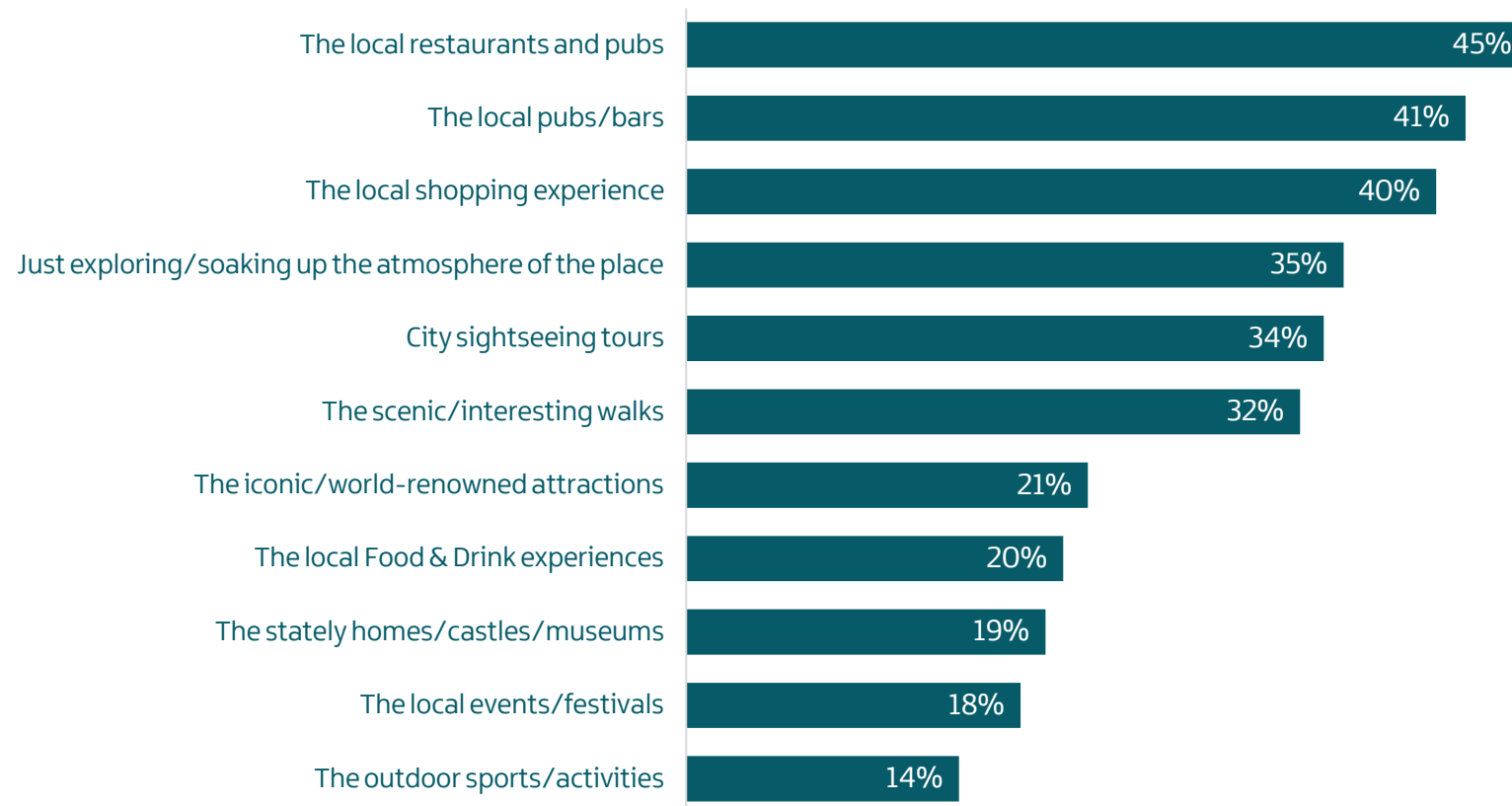
Over half of trips in NI in 2025 were to Greater Belfast

Where they visited in NI in 2025



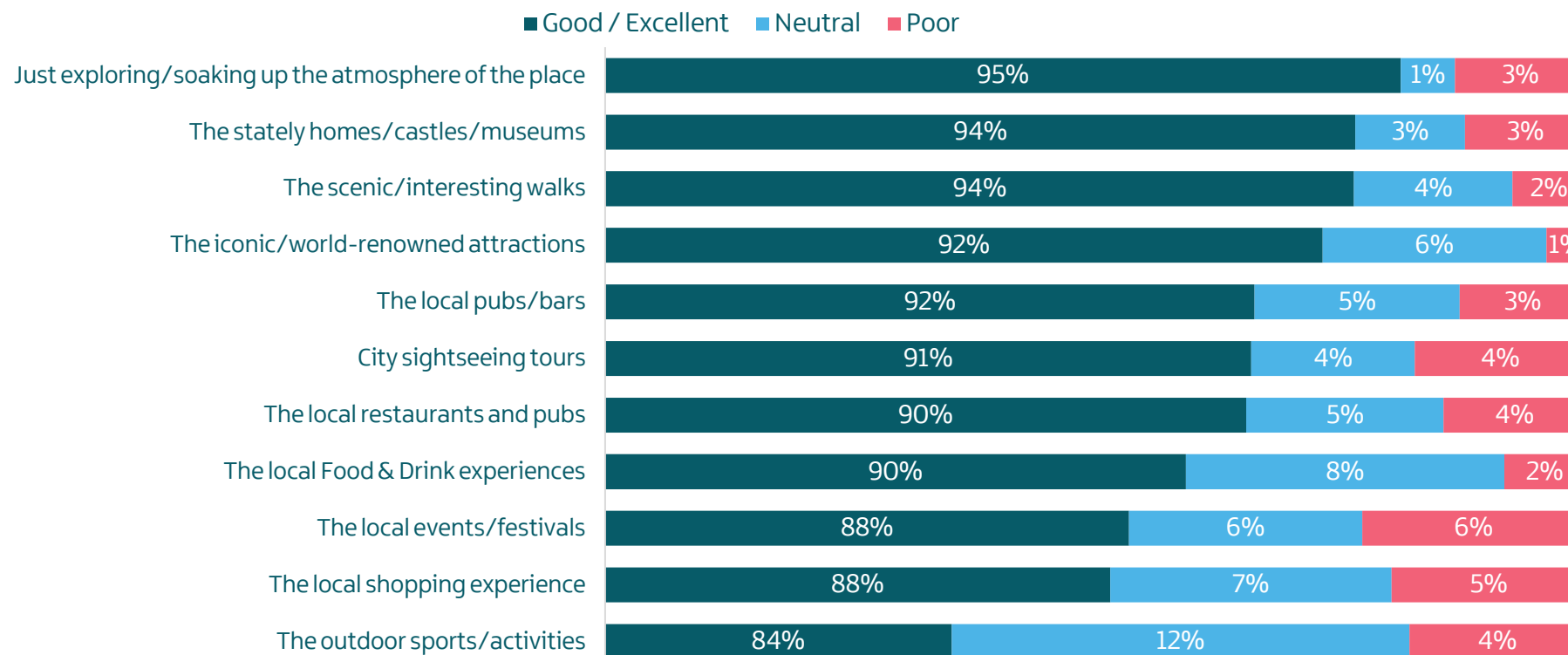
ROI visitors most drawn to NI's hospitality, shopping and scenic experiences

What they visited / experienced on NI short & long trips in 2024/25



Scenery, sites and local food and drink were particularly enjoyed by those that experienced them

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

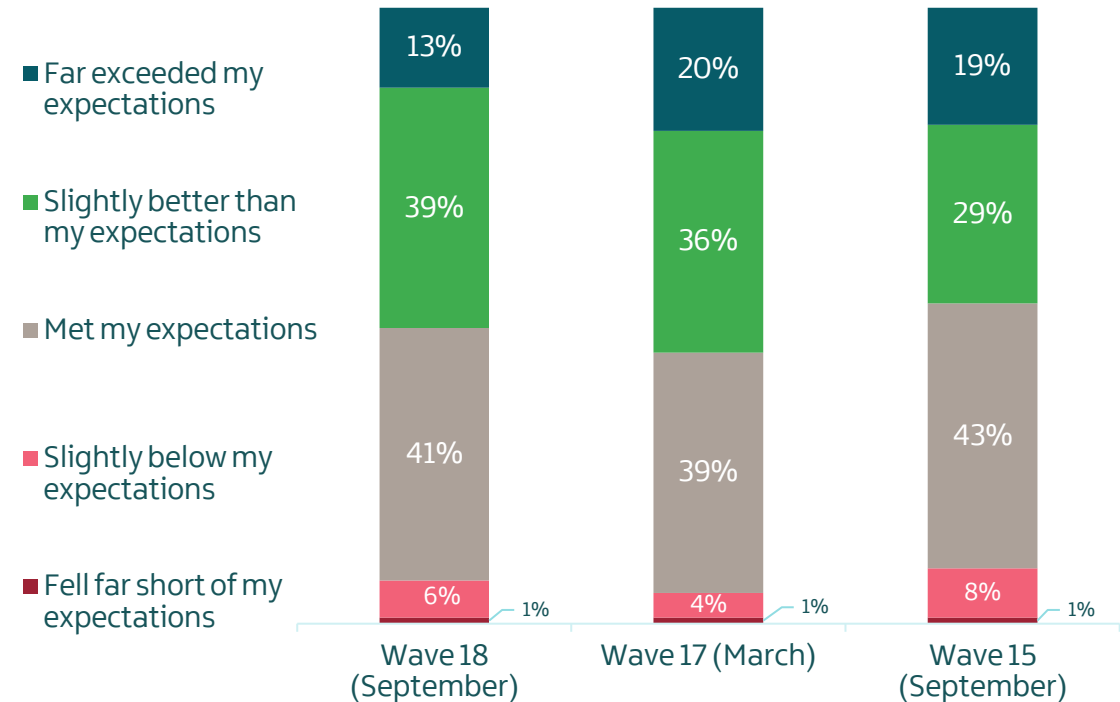


Increase in the number of people who had their expectations met or exceeded vs last year

93%
had their expectations met or exceeded

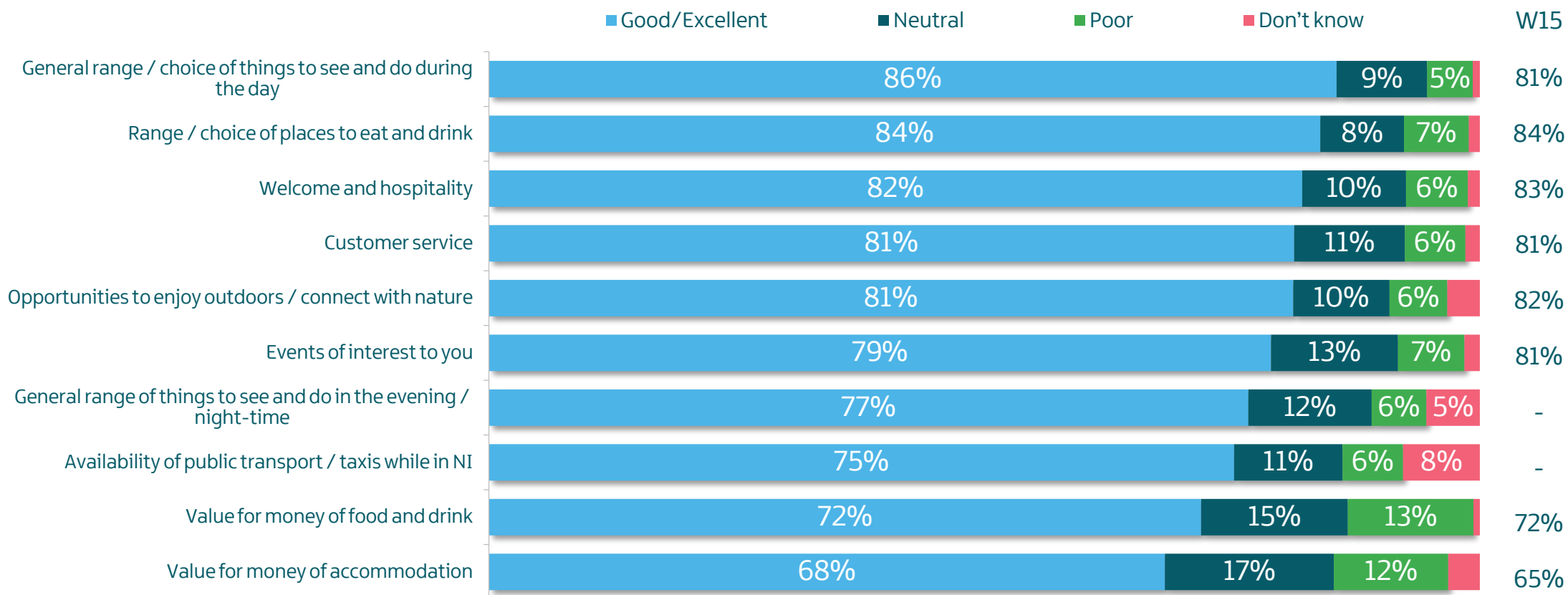
vs 91% in Wave 15 (September '24)

Those who visited NI felt their trip...



Strong satisfaction with outdoor & daytime experiences and the welcome

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



A high-angle photograph 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 a clear, pale blue. The overall scene is one of natural beauty and adventure.

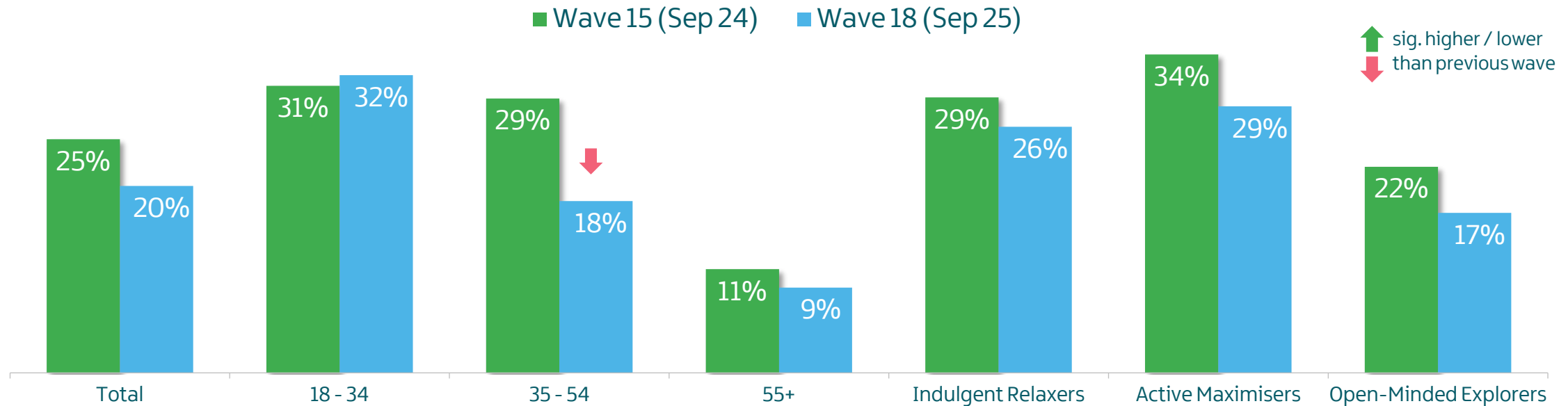
Travel intent



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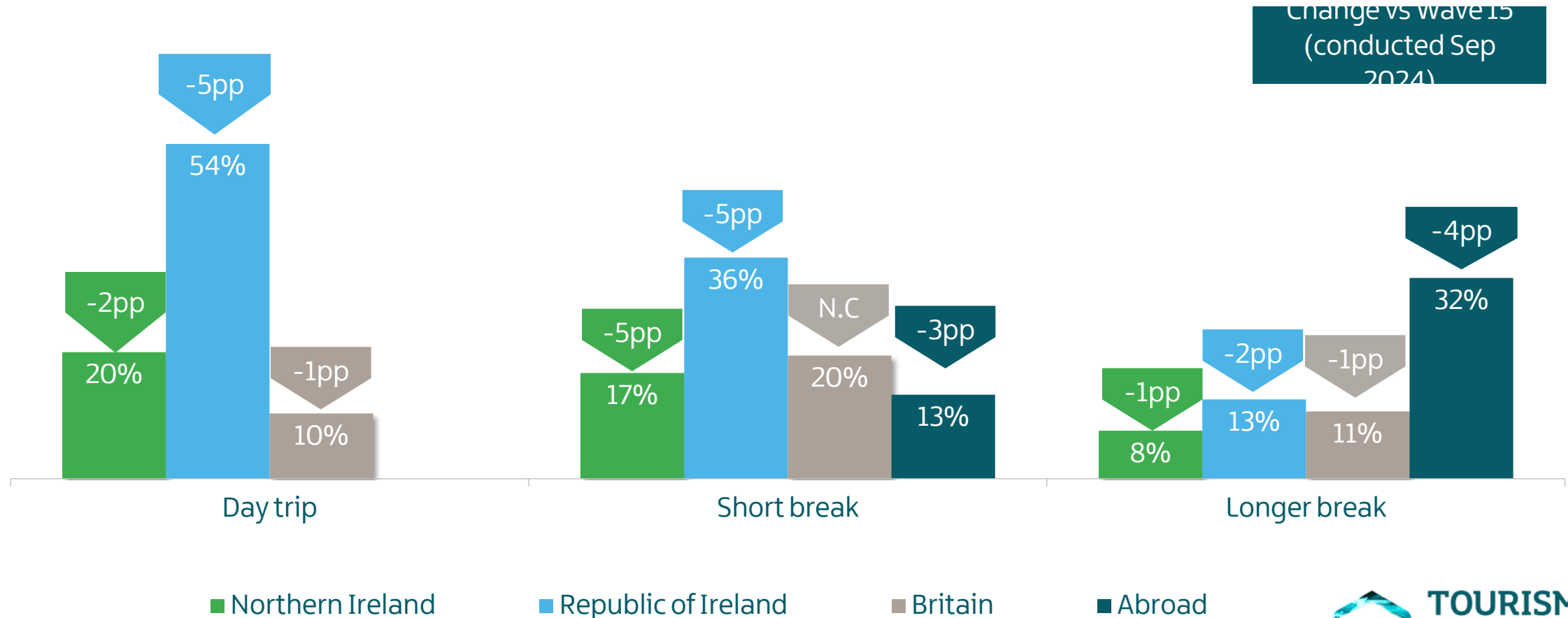
Decline in overall NI short and long break intentions, with a considerable decrease for those aged 35 -54

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



Overall, trip intentions for the remainder of 2025 are down vs 2024

Intentions of taking a break in the remainder of 2025

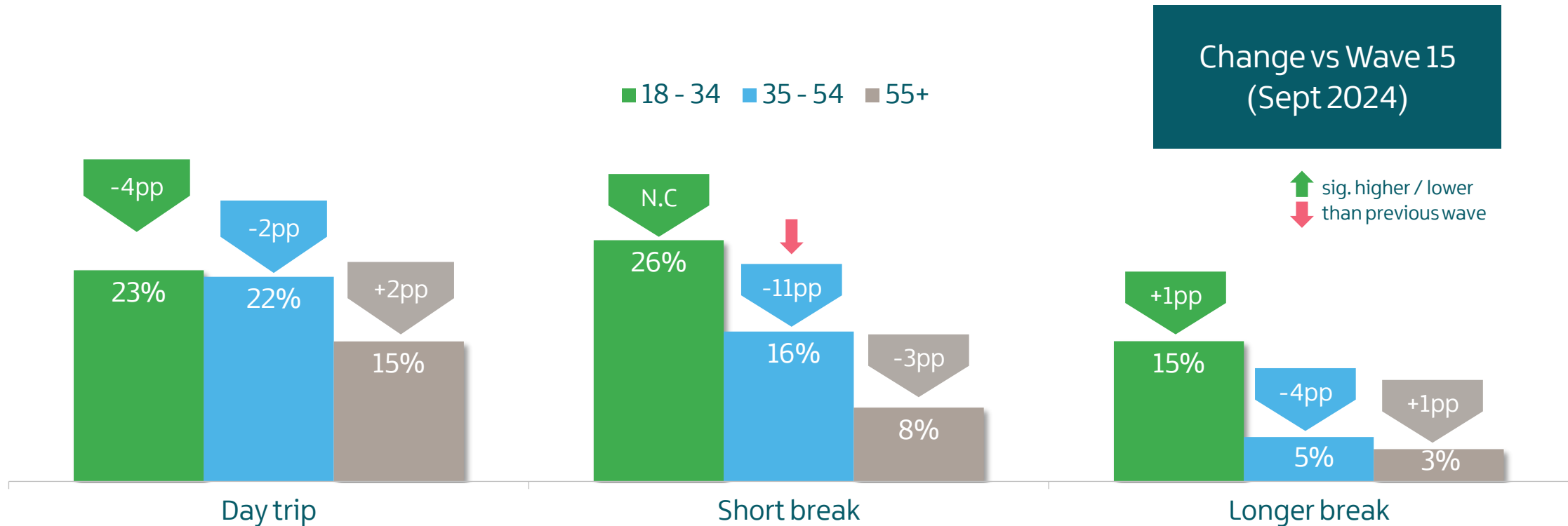


■ Northern Ireland ■ Republic of Ireland ■ Britain ■ Abroad



Short break intentions to NI have declined for 35-54s; 18-34s remain most inclined to travel to NI overall

Intentions of taking a break in **NI** in the remainder of 2025 – by age

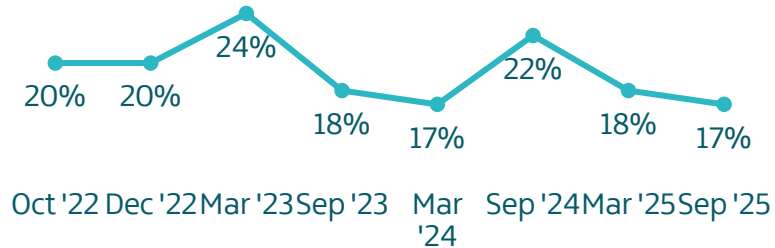


N = 18-34 (240) 35-54 (300) 55+ (210)

E1. 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 (September to December)?

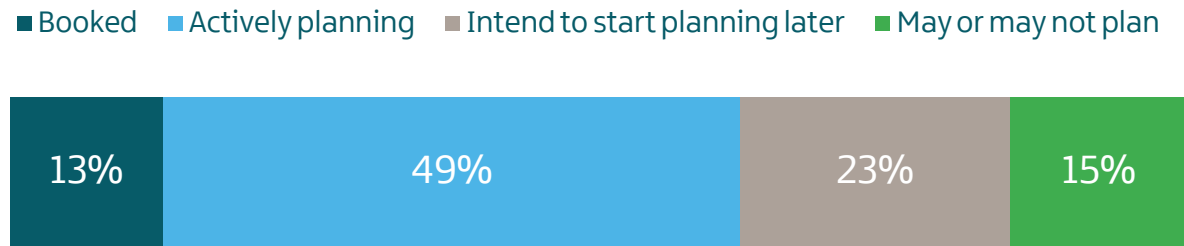
Of those intending to take a short break in NI, over half have already booked or are actively planning

17%
are considering a short break in NI in Sep-Dec



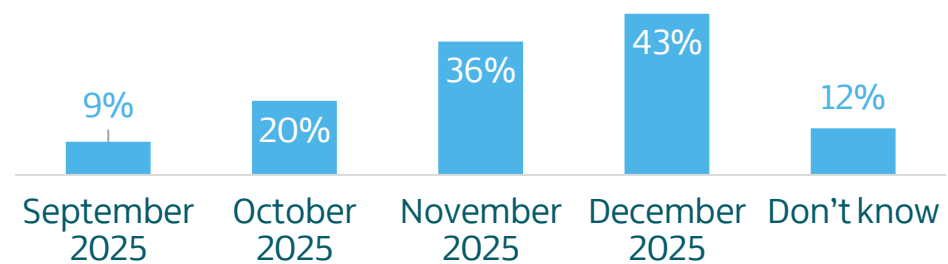
N = 750 / 127 considering short break

Status of short break – have they booked?



62% of those considering a short break are actively planning or have booked a trip to NI – 11% of the total sample

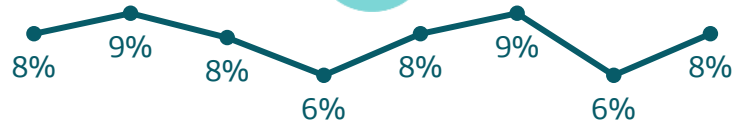
Short break planned for



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 (September to December)? 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?

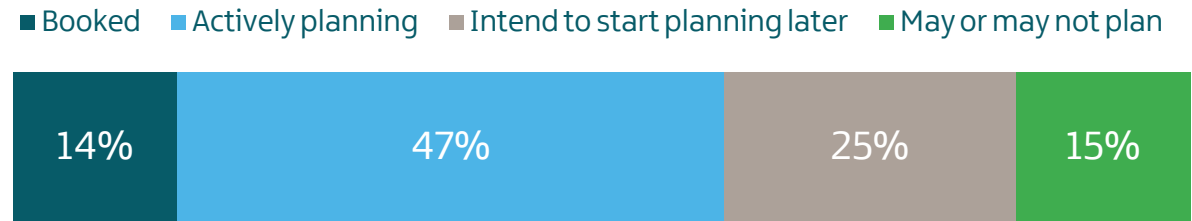
There is also a similar pattern for long breaks, with 3 in 5 considerers having already booked or actively planning

8%
are considering a long break in NI in Sep-Dec



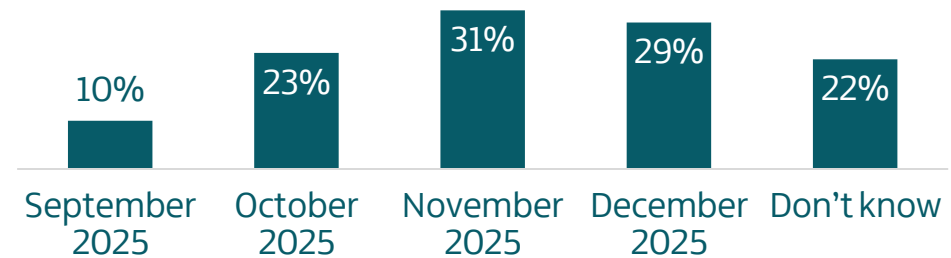
Oct '22 Dec '22 Mar '23 Sep '23 Mar '24 Sep '24 Mar '25 Sep '25

Status of long break – have they booked?



60% of those considering a long break are actively planning or have booked a trip to NI – 5% of the total sample

Long break planned for



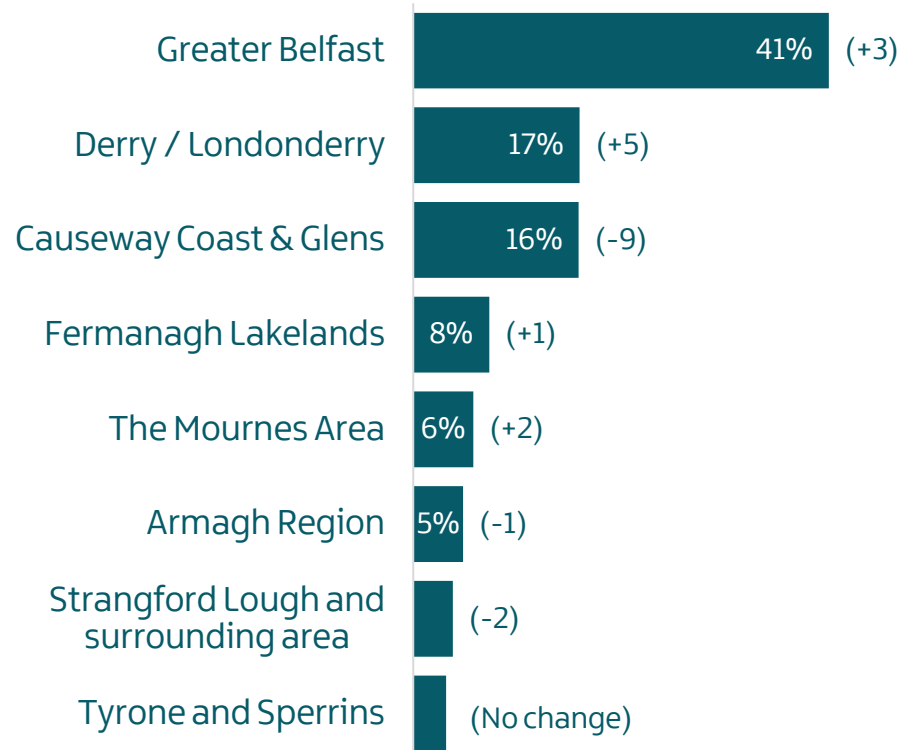
N = 750 / 58 considering long break



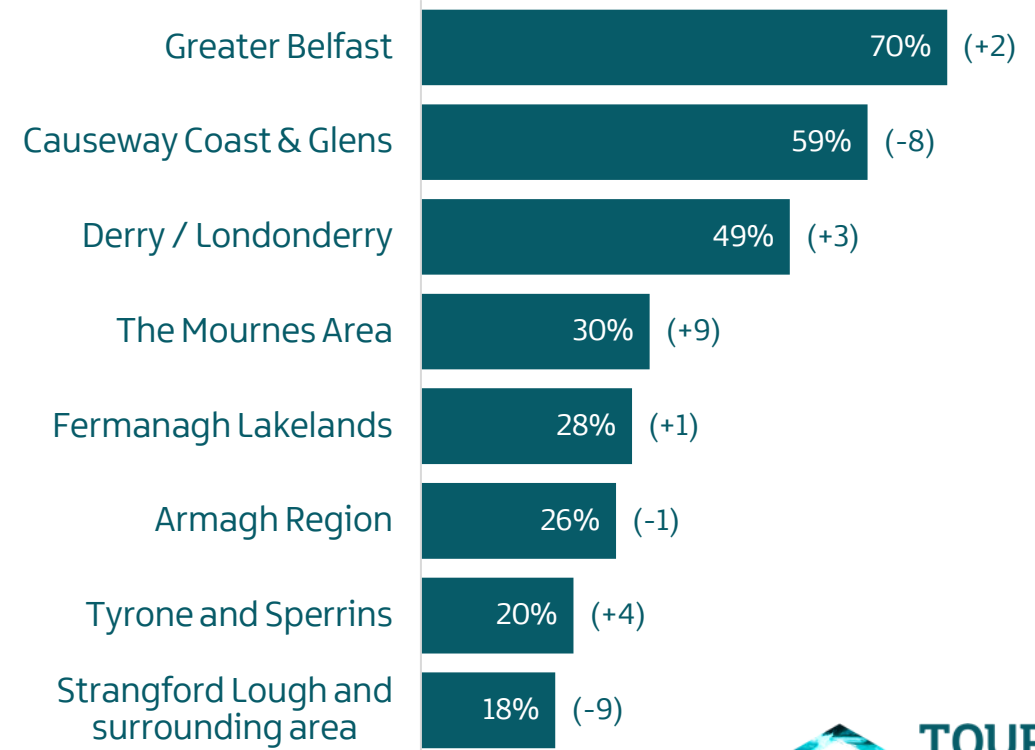
E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (September to December) / E2. Which specific month, if any, did you have in mind for your break(s) in Northern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

Belfast continues to be the most considered place, with Derry / Londonderry and Causeway Coast also popular

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

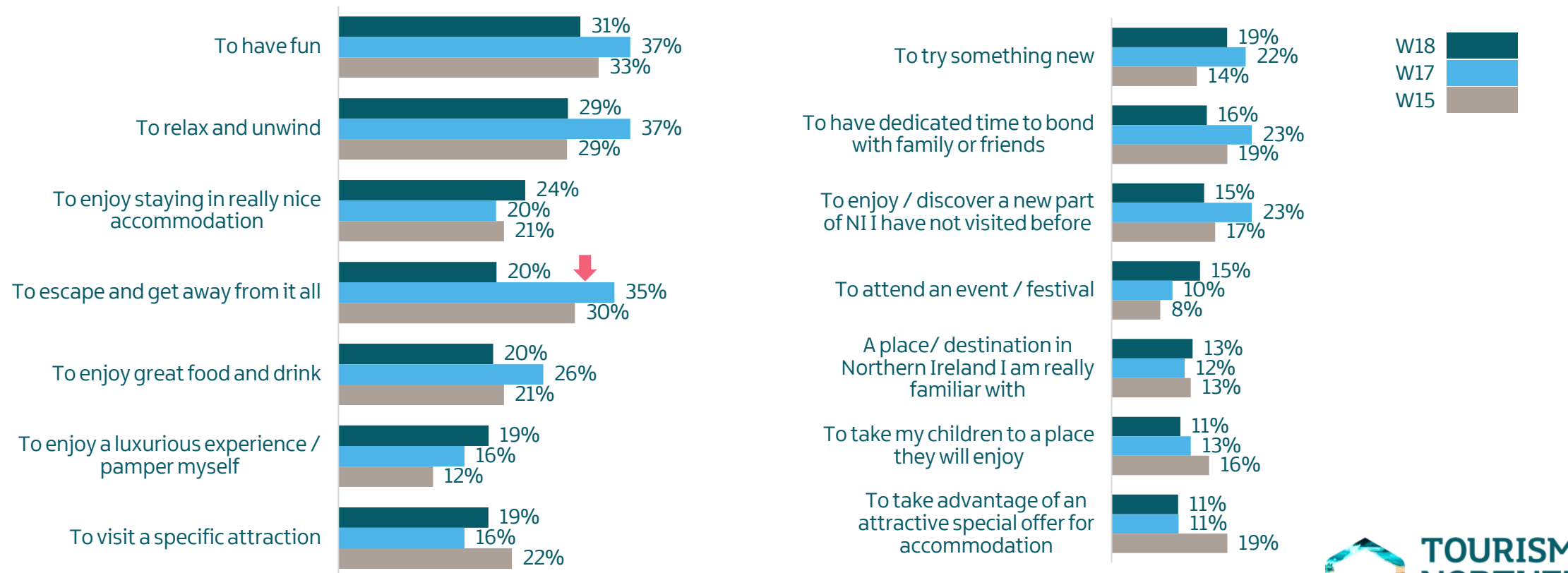


Destinations in top 3 consideration for next trip (vs March)



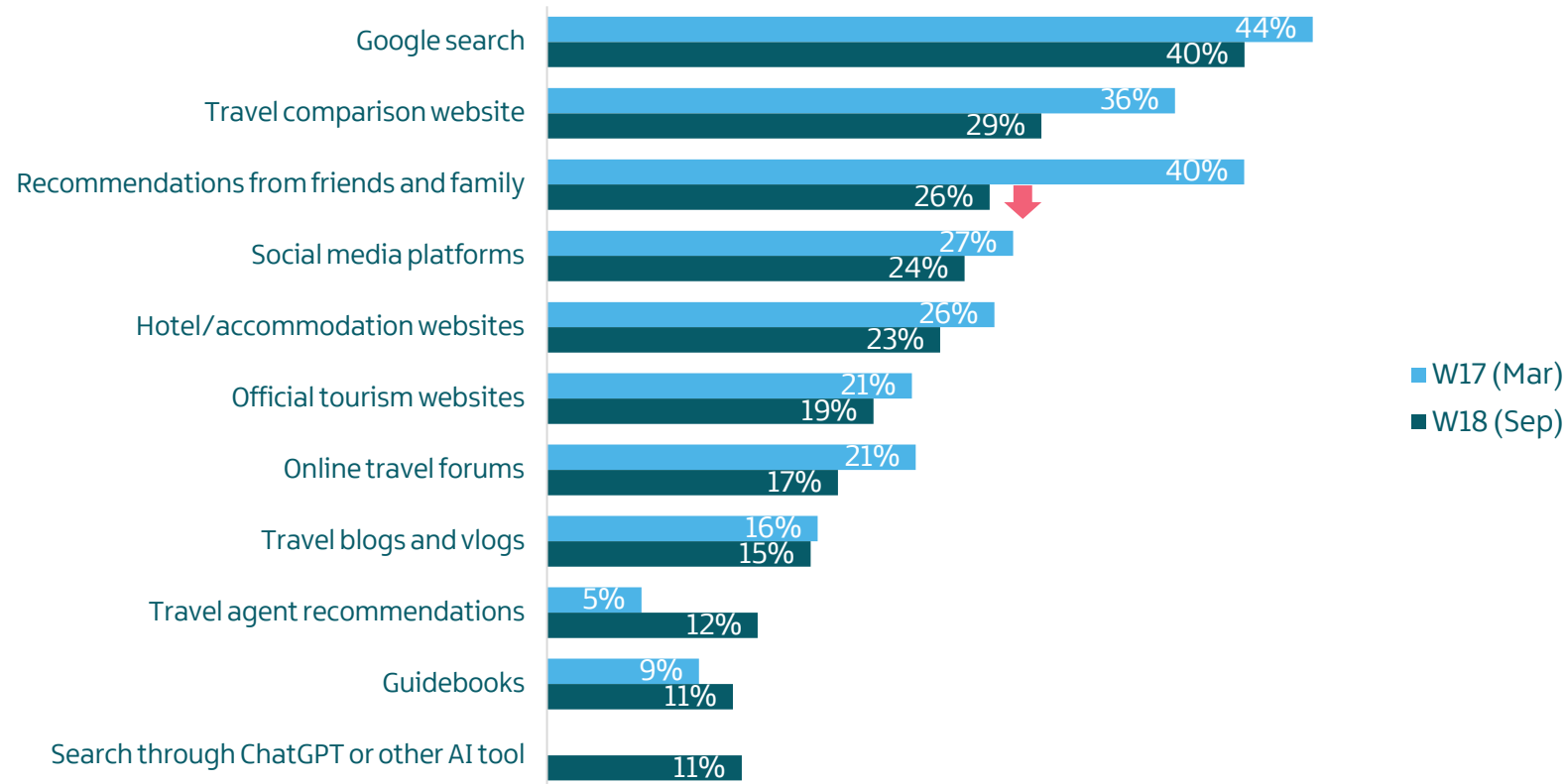
Most still want to travel for fun and relaxation purposes – with fewer feeling the need to escape

Trip motivations (long and short combined)



Google searches continue to be the most popular method for research; reduction in word of mouth

How they plan to research their trip



Booking.com is again the main choice of comparison site – 61% doing research via this site (down – 7pts vs. W17). 14% are doing research via Hotels.com

↑ sig. higher / lower than previous wave
↓

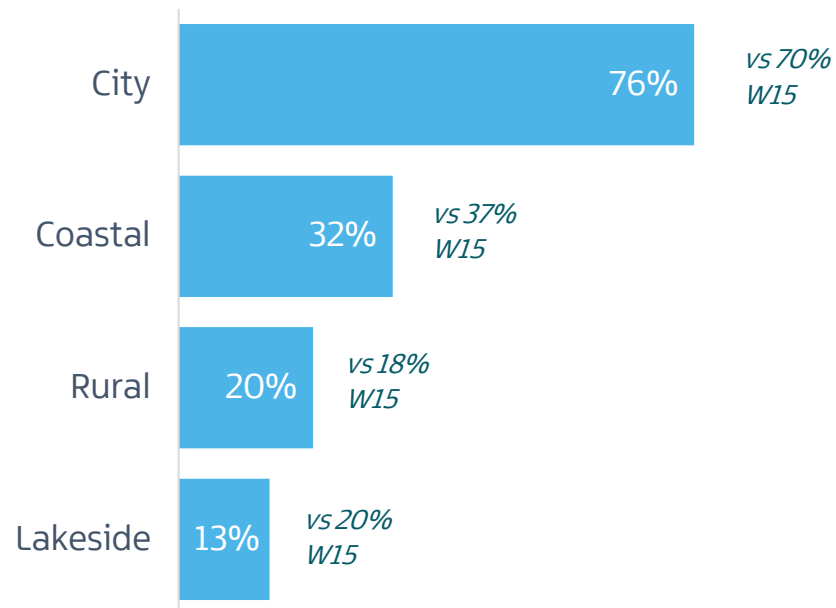
N = 141 planning long or short break

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?

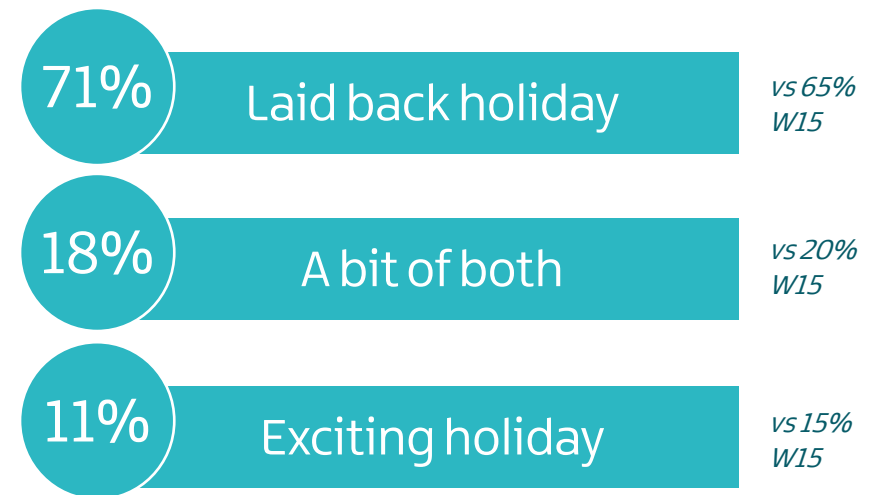


City breaks continue to be the most preferred trip type, with a preference for a more laid-back trip

Type of break preferred



Type of trip preferred



N = 141 planning long or short break

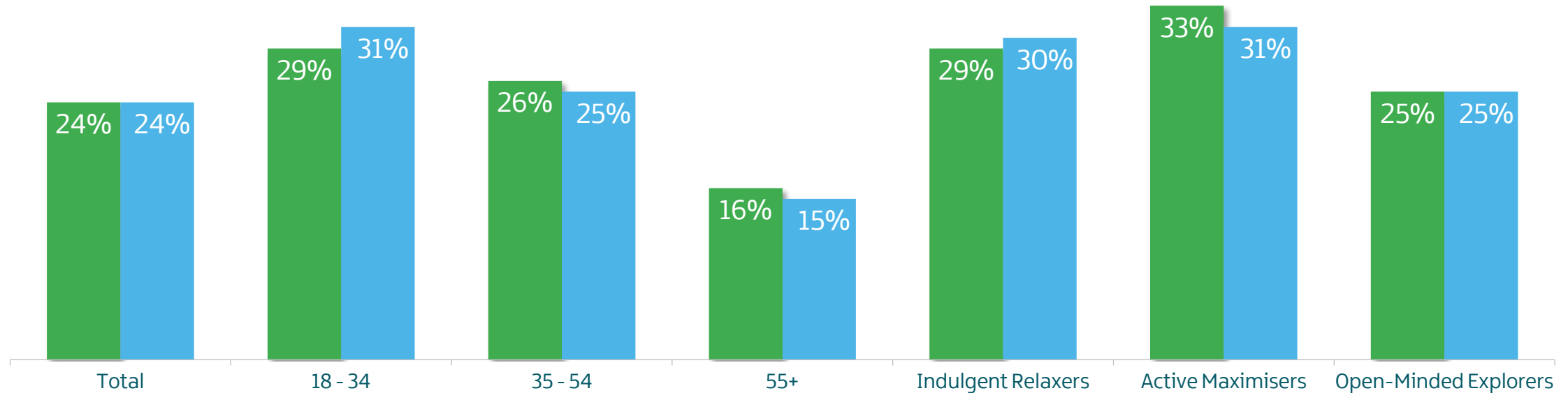


E1e. Which of the following destination types would you consider for your next trip in Northern Ireland? / E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer?

Winter / Spring short and long break intentions show little change when combined, holding stable across the board

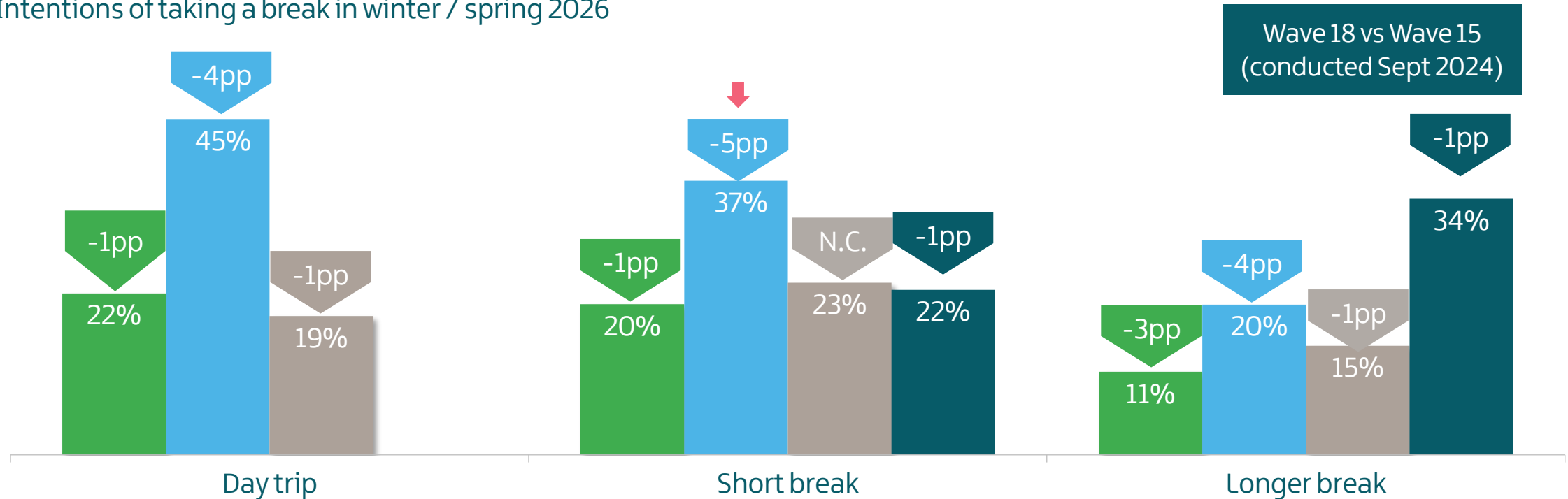
Intentions of taking a break in winter / spring 2026 in NI– Short and Long trips combined

■ Wave 15 (Sep 24) ■ Wave 18 (Sep 25)



Softening in trip intentions for early 2026, though ROI remains the leading destination for day and short breaks

Intentions of taking a break in winter / spring 2026



↑ sig. higher / lower
↓ than previous wave

■ Northern Ireland

■ Republic of Ireland

■ Britain

■ Abroad

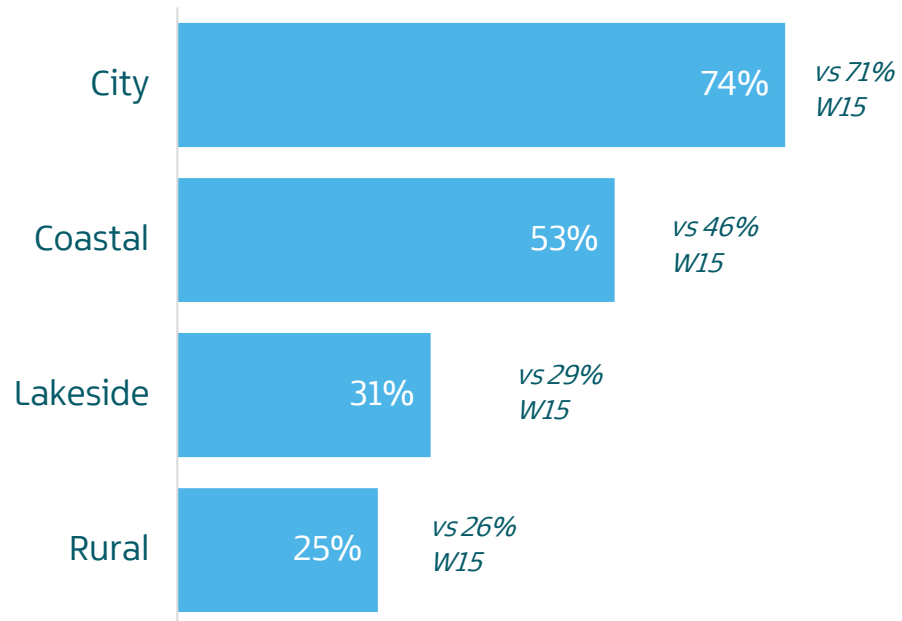
N = 750



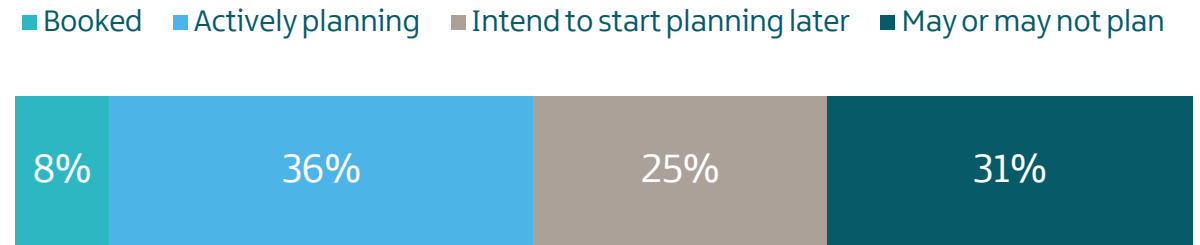
E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in winter/spring 2026 (January to April)? E24b. Would you consider taking a short break of at least 1-3 nights in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in winter/spring 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 winter/spring 2026 (January to April)?

City and coastal breaks remain most considered

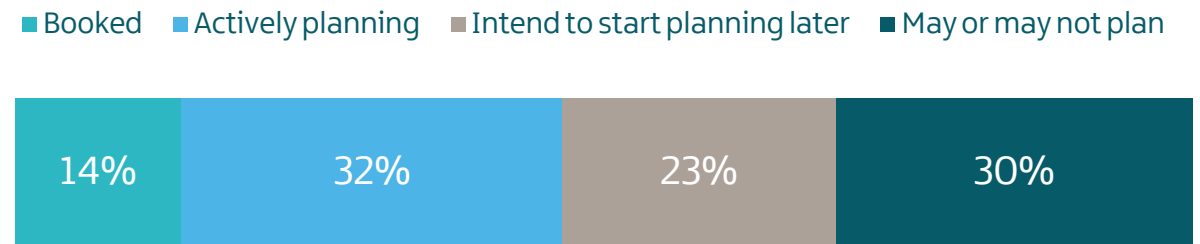
Type of break considered



Amount of short break planned



Amount of long break planned



N = 179 considering long or short break in winter / spring 2026

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



Half are considering a break abroad in the next 6 months

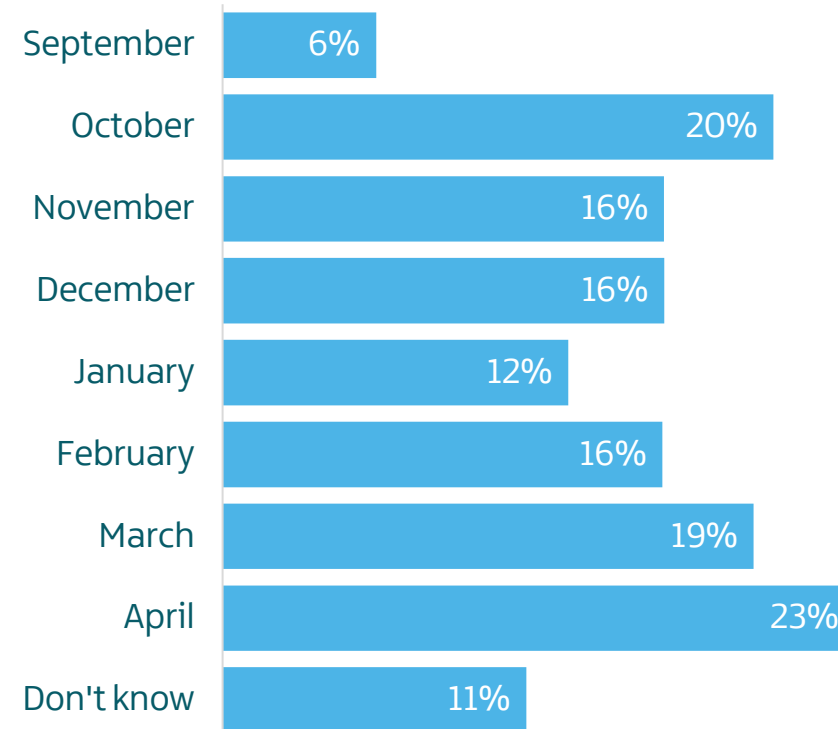
49%

of total sample are considering a break abroad in the next 6 months
(vs. 54% W15)

64%

of this cohort are actively planning or have booked their trips
(vs. 61% W15)

When trips abroad are planned for



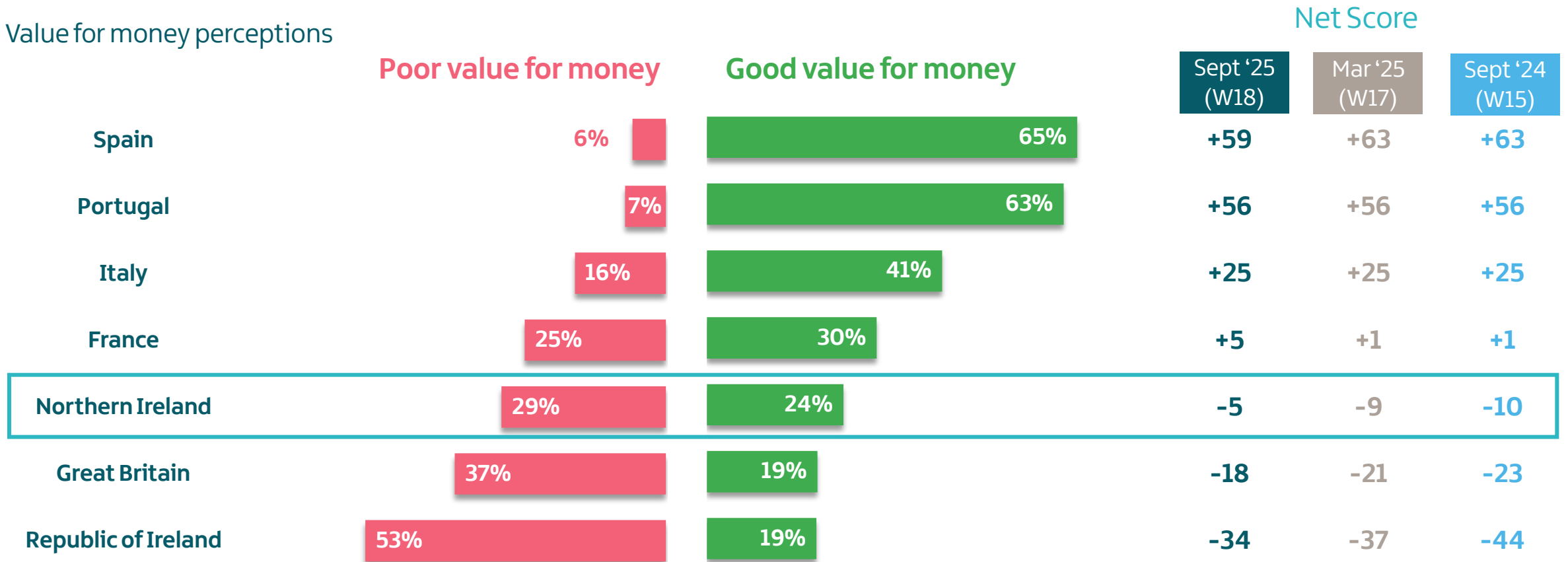
N = 367 considering trip abroad



Value for money

NI's value for money (VFM) score has improved from previous waves

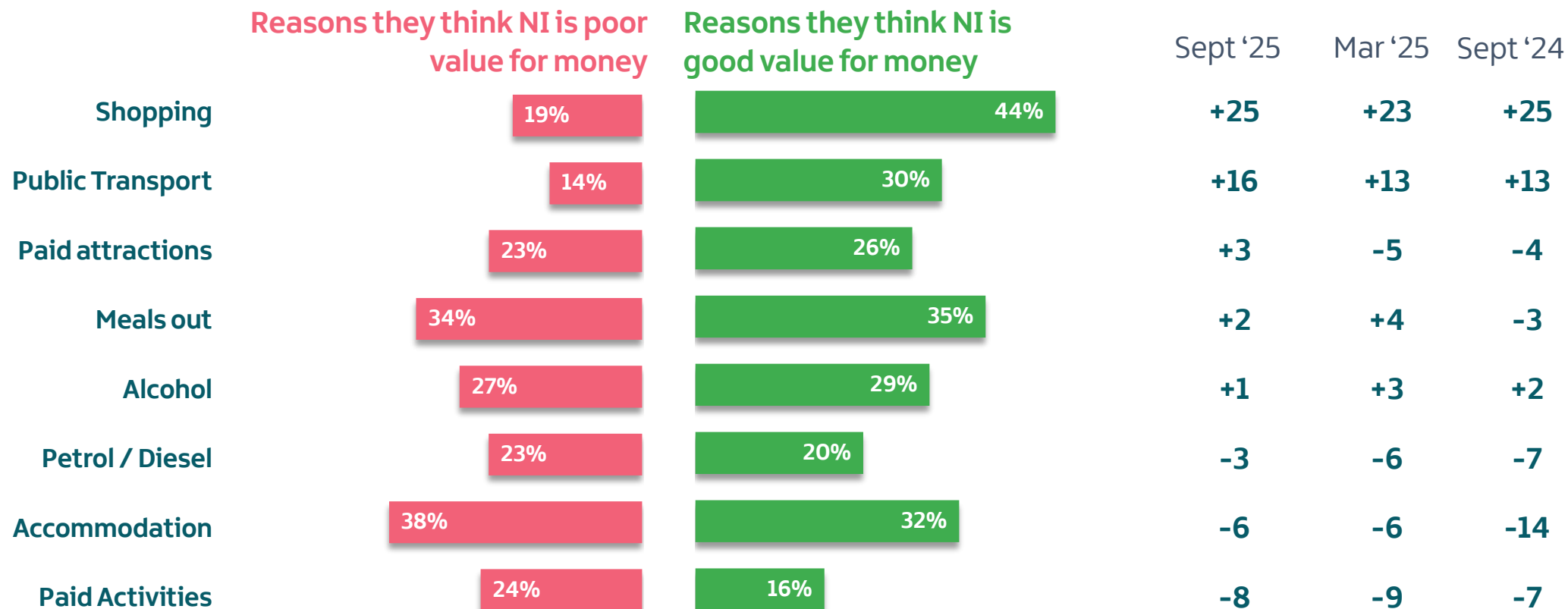
Value for money perceptions



VFM perceptions have increased for shopping, public transport, petrol/diesel and paid attractions

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

Net score





Cost of living



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Cost-of-living increases having a bigger impact now vs earlier in the year

What could stop them going to NI

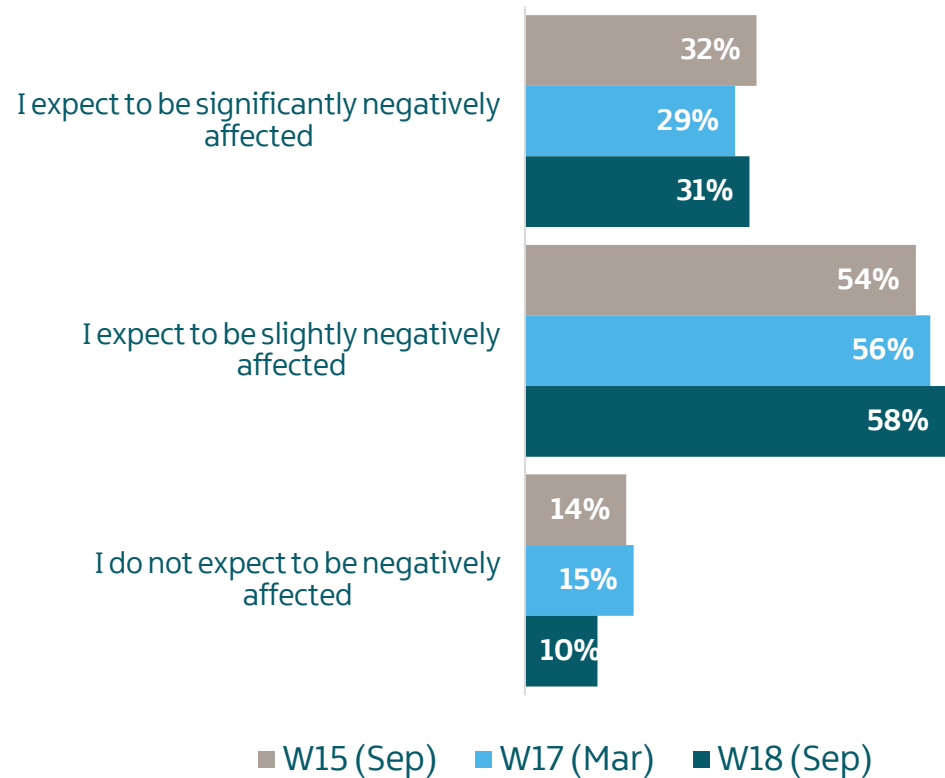


18-34s more likely to cite cost of activities (33%)

And 1 in 10 people say that they expect to be significantly impacted by the cost-of-living increases – a YOY increase

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

90%
expect to be affected by cost of living increases

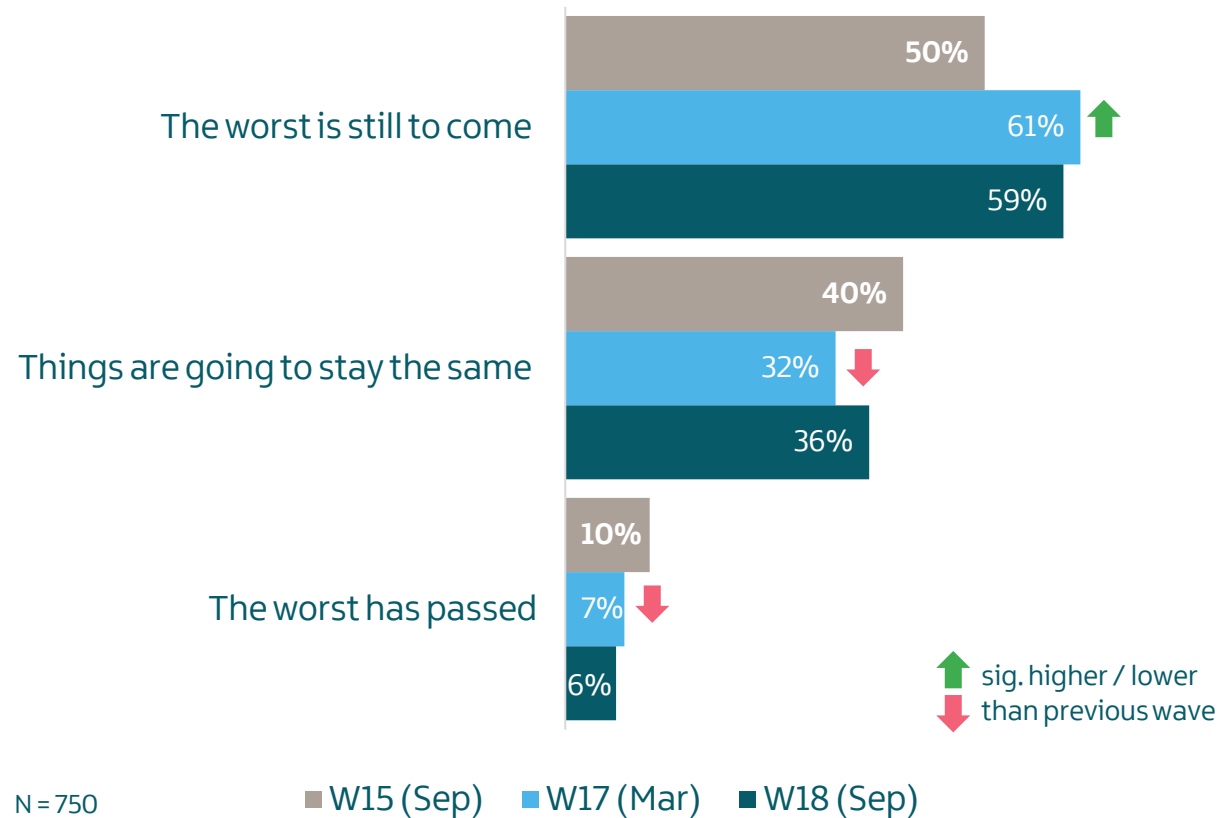


Women more likely to say they'll be significantly affected (35%)

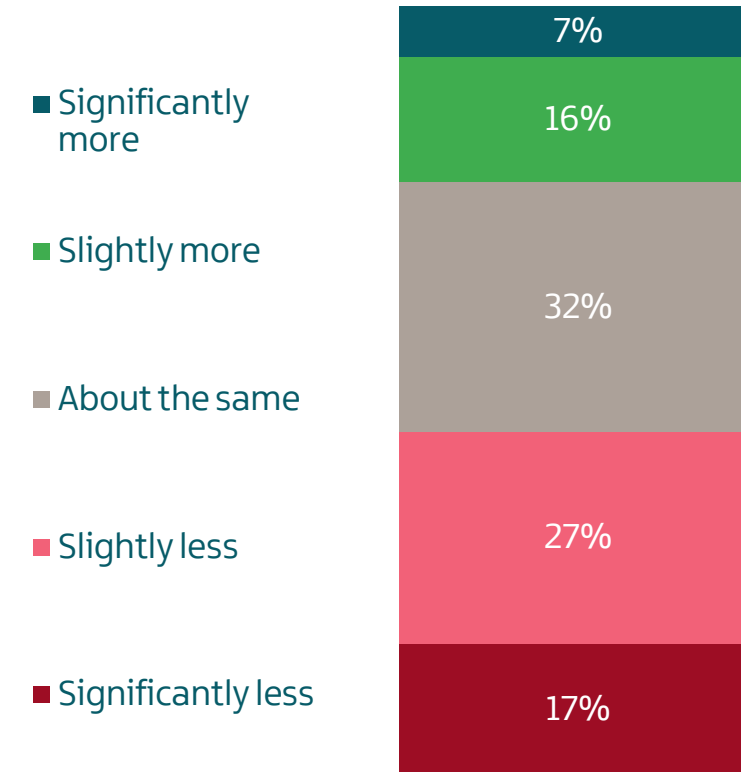


Many still believe that the worst is still to come, with over two-fifths reporting a drop in disposal income for holidays

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



How disposable income to spend on activities / holidays has changed

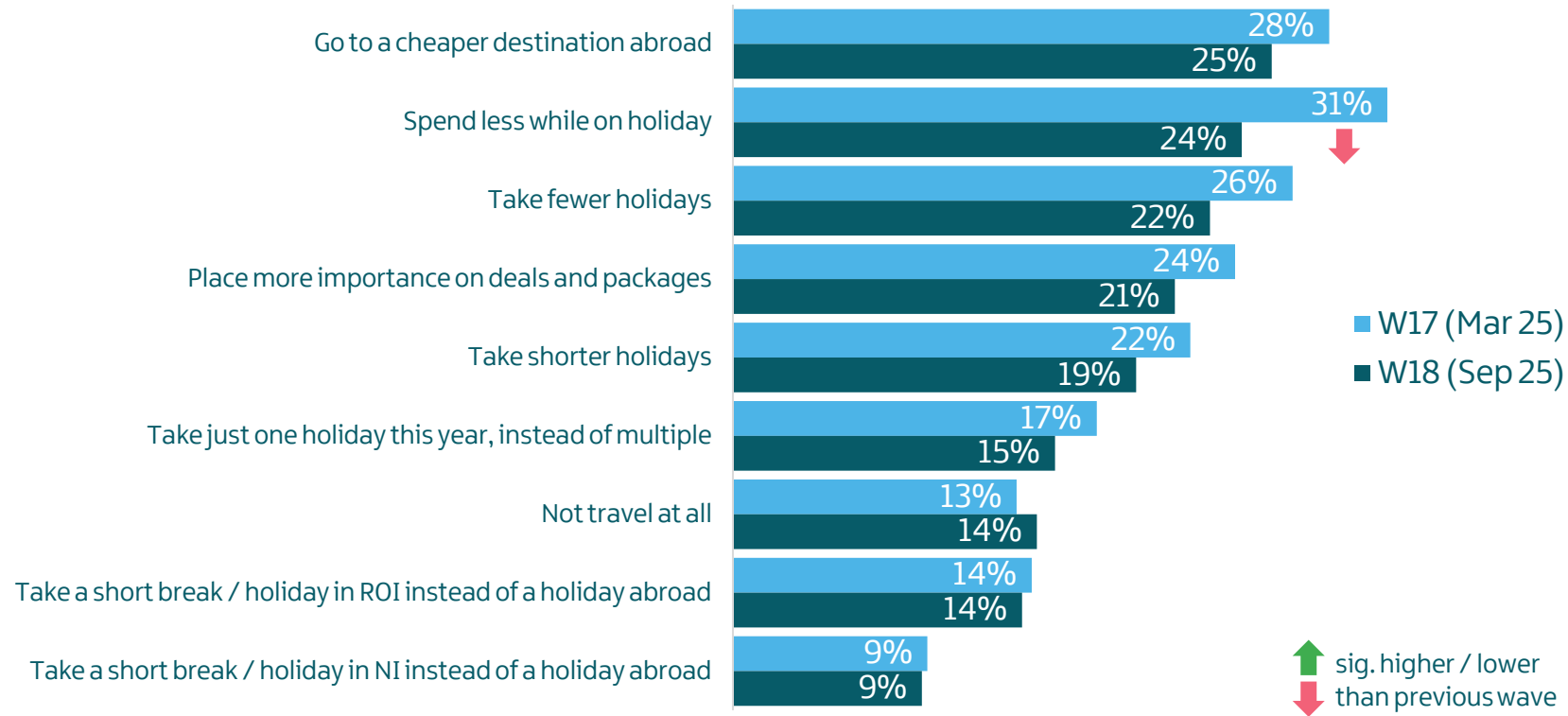


N = 750

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

There is a decrease in those spending less while on holiday vs earlier in the year

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



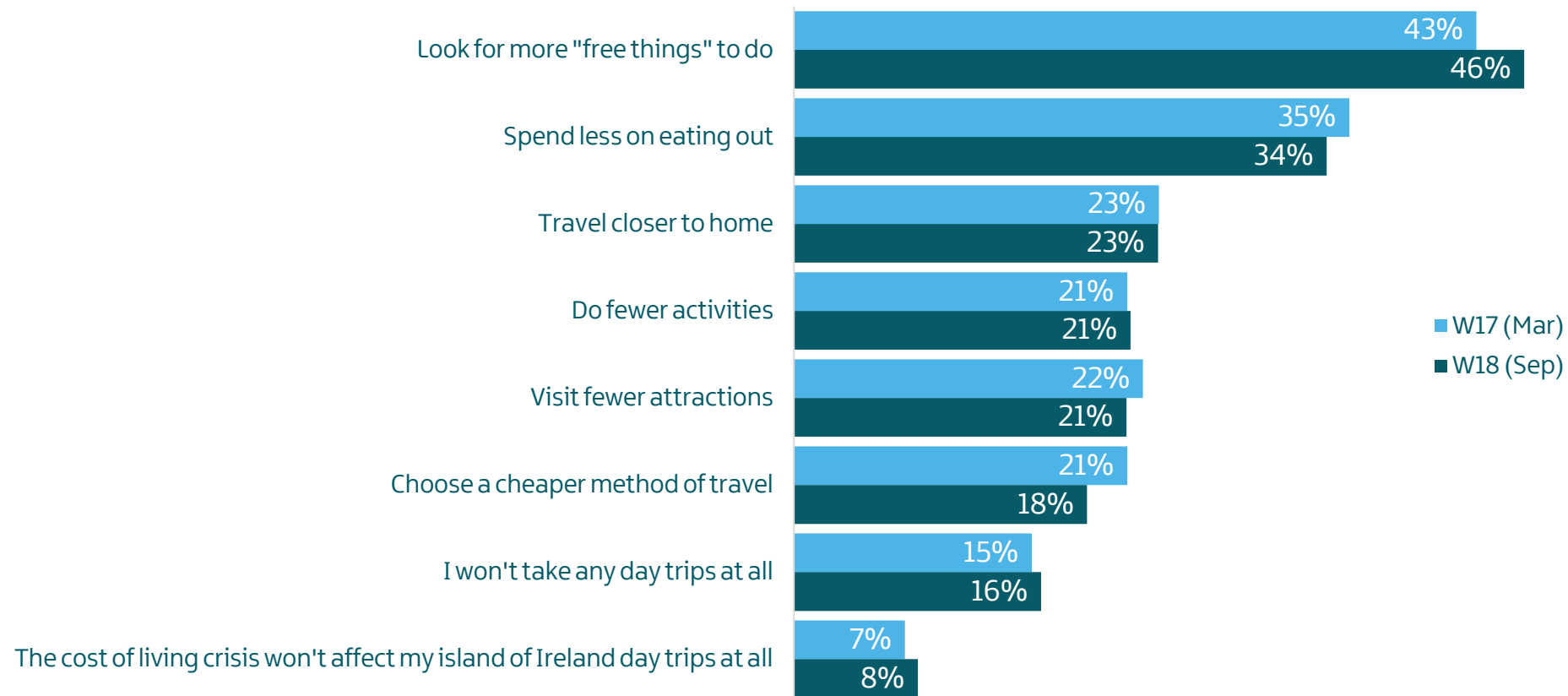
18-34s are more likely to take a short break in NI (18%) or ROI (18%) instead of going abroad compared to other age groups. They are also more likely to just take one holiday this year (19%)

Active Maximisers are more likely to place more importance on deals and packages (27%)



Nearly half of people are still looking for free things to do when on a day trip in NI

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





Summary



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Summary

Travel Experiences: Satisfaction Remains High

- The number of ROI residents who took either a long or short break in NI during the first nine months of the year is largely stable compared with the same period in 2024. More visitors report that their trips to NI met or exceeded expectations.
- The range of things to do and see, the choice of places to eat & drink, and the welcome and hospitality were particularly highly rated.

Looking Ahead

- Looking ahead to the last quarter of the year and early 2026, a softening in NI trip intentions is evident among ROI consumers.
- While competition from abroad remains strong, there has been a marginal decline in the number of ROI consumers considering this type of break in the next six months. Intentions to take a domestic break have also decreased over the next six months among ROI consumers.

Value for money

- Consumers in ROI 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.
- The continued negative perception of value for money associated with domestic breaks in ROI presents a potential opportunity for NI, particularly given the current economic climate.

Cost-of-Living: A Persistent but Familiar Challenge

- Many ROI consumers perceive the cost of accommodation as a key barrier to visiting NI. This, coupled with the finding that over two-fifths of ROI consumers are reporting a drop in disposal income for holidays, suggests that affordability is a growing concern.
- The increased cost of living and concerns over personal finances are also key potential barriers for taking a trip to NI over the next six months.