# Tourism Northern Ireland Consumer Sentiment Research

NI Market – Wave 17

April 2025

# Research background

TOURISM NORTHERN IRELAND

# Research background & objectives

This is the 17th wave of our consumer sentiment research for the Republic of Ireland (ROI). We have continued to look at consumer attitudes towards travel in Northern Ireland (NI) and elsewhere, keeping an eye on how things have changed throughout the early part of 2025 and intentions for spring/summer 2025.

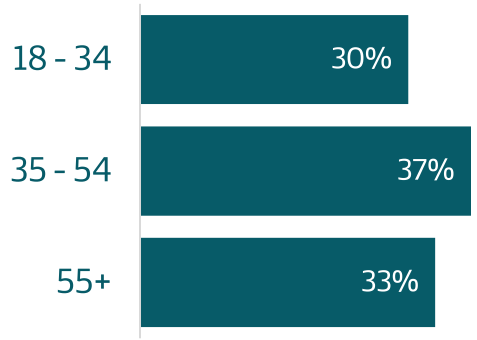
Objectives:

- 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.

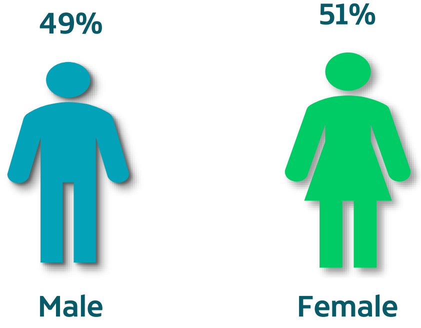
** Where applicable, comparisons are made to Wave 14, as this was conducted at the same period in 2024, and/or Wave 15 which was the last regular wave of consumer sentiment research. Wave 16 was an internal piece of research in which different metrics were tracked.*

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

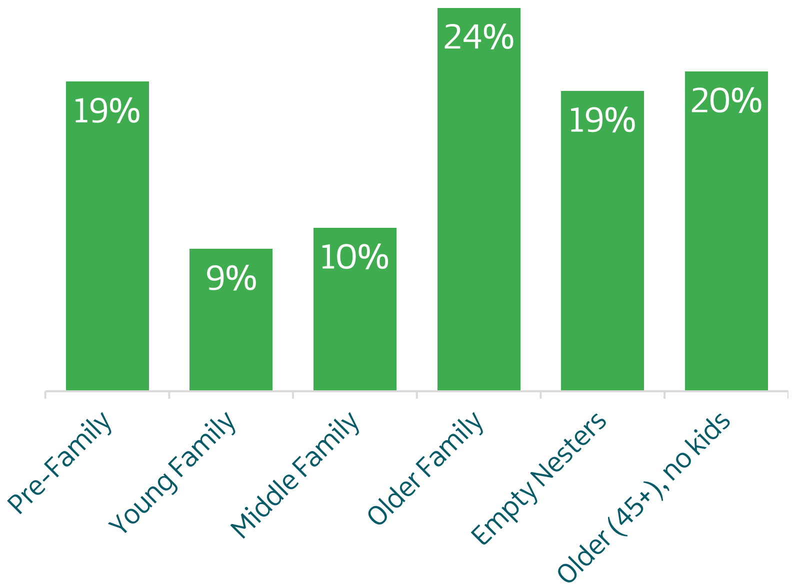
## Age



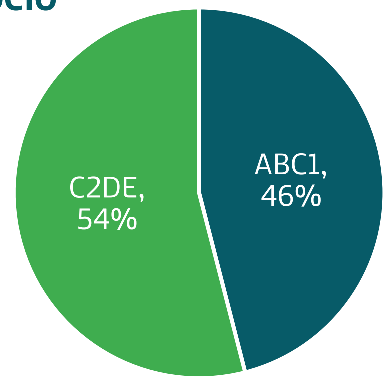

## Gender




## Lifestage




## Socio




## Region


Fieldwork was conducted between 17.03.25 and 09.04.25

# Contents

# Travel experiences

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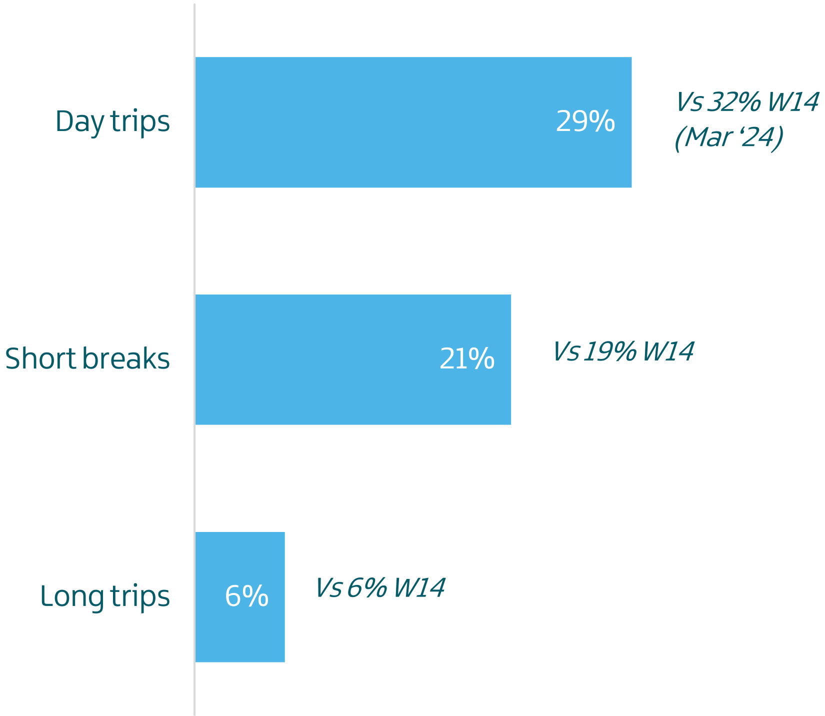
# Slight increase in number who've taken short breaks within NI – number going abroad also increases

**22%**

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

**Wave 14 (Mar 2024): 20%**

**% of total sample who took a trip in NI**




**Other than NI...**

21% took a break in ROI
*Vs 23% in W14*

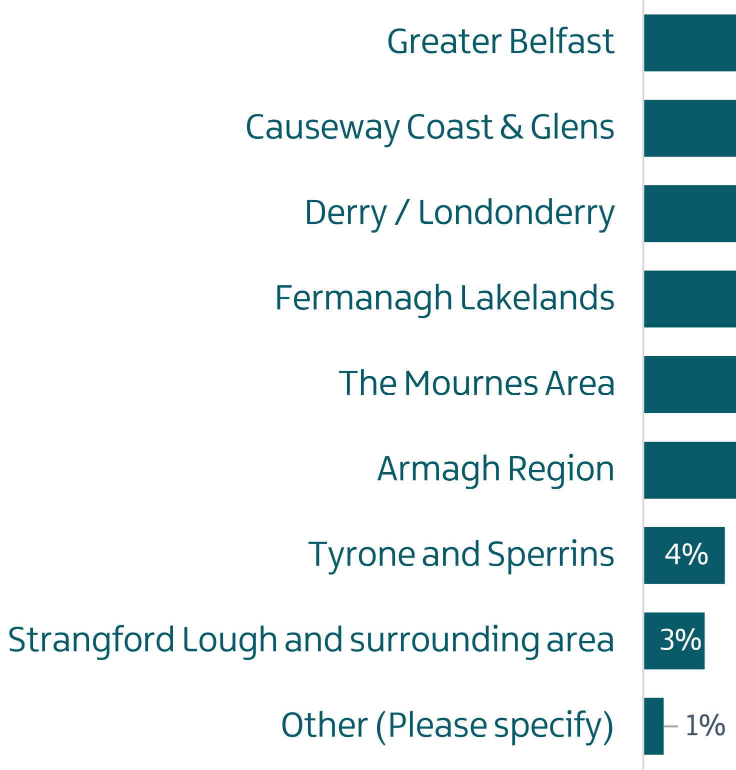
24% went abroad
*Vs 17% in W14*

52% didn't travel at all
*Vs 56% in W14*

N = 400 D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes since the start of January 2025?

# Belfast is the most popular destination in NI for visitors travelling in 2025 so far

### Where they visited in NI in 2025

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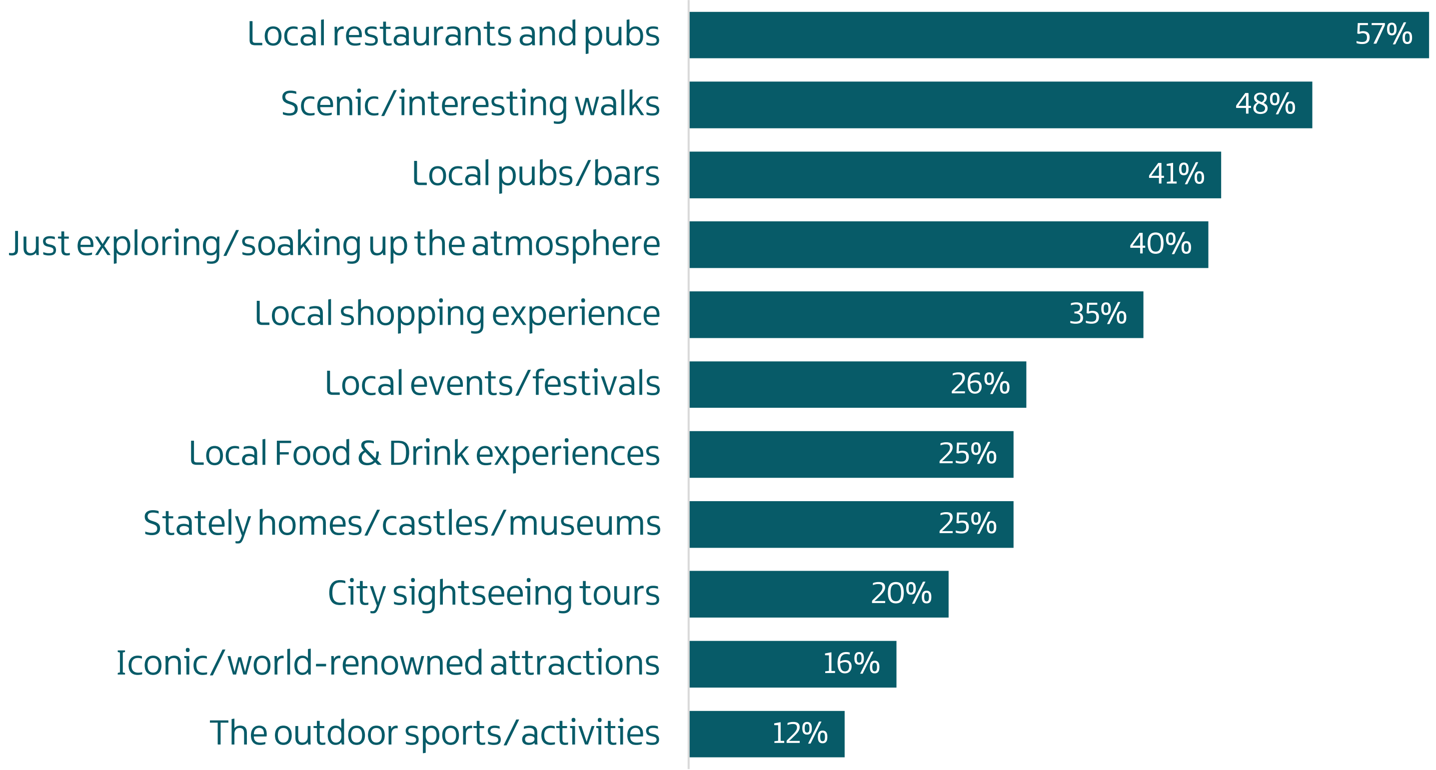
N = 143 who took any trip in NI 2025

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

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

**What they did / experienced in NI in 2024/25**




55+ more likely to just be exploring/soaking up the atmosphere (61%)

Middle families (with children aged 6 to 11) more likely to have visited the stately homes/castles/museums (46%)

Social Instagrammers more likely to have attended local events/festivals (26%)

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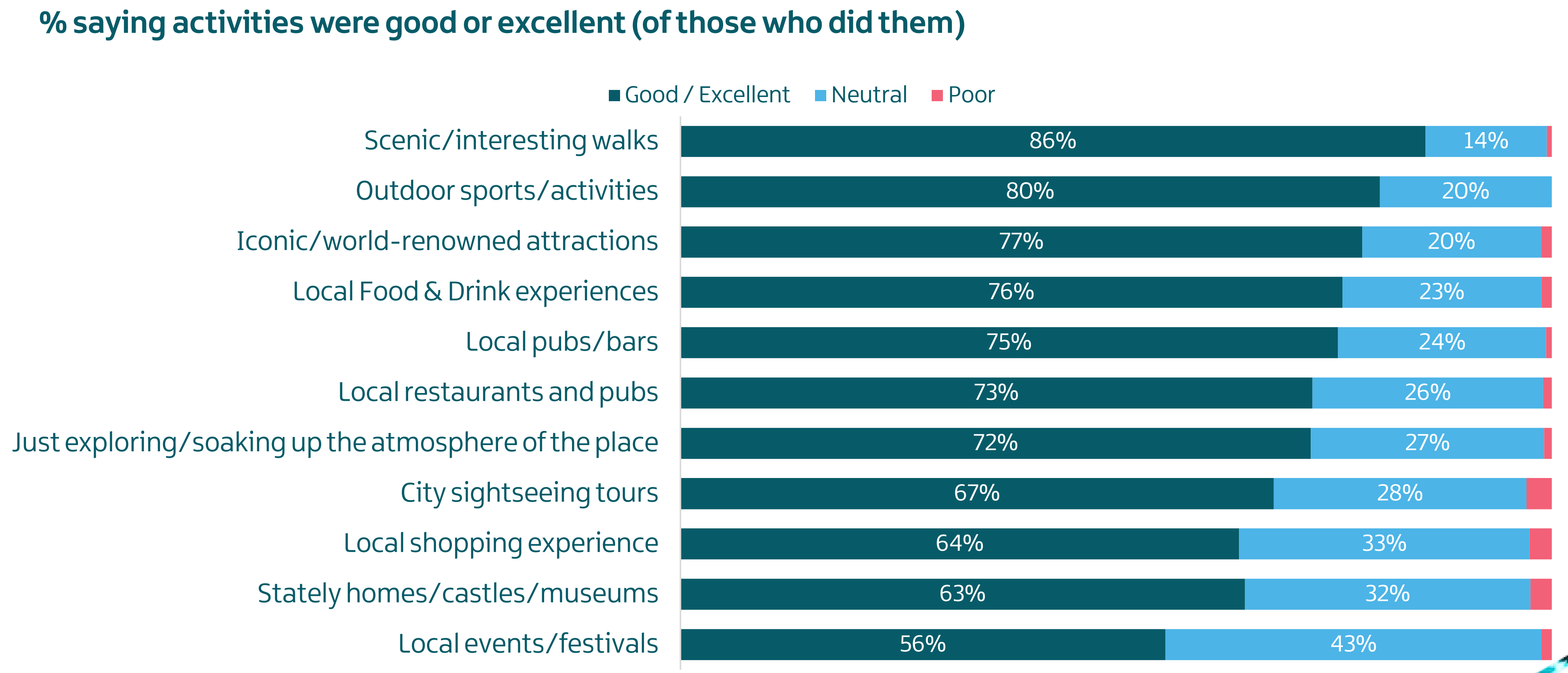
N = 271 who took a short or long break in NI in 2024/5

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

# Most are satisfied with activities participated in – especially walks and other outdoor activities

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N = between 34 and 154 (depending on activities engaged in)

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

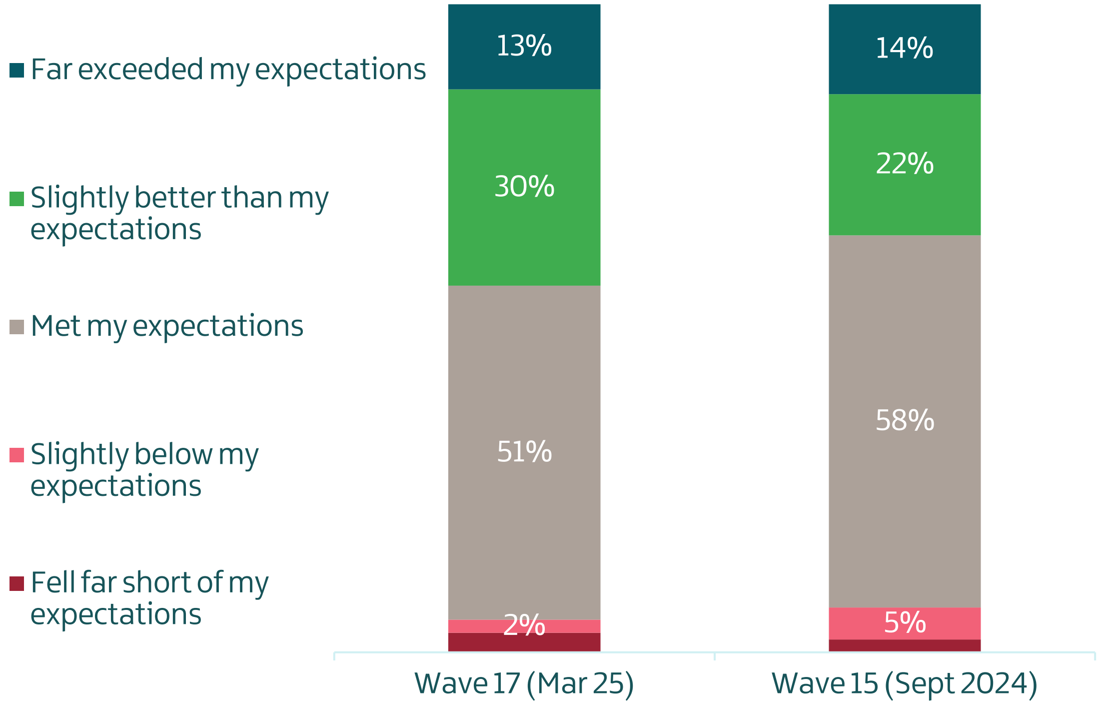
# Increase in number having expectations exceeded vs. September; overall, still near-unanimous satisfaction

**95%**

had their expectations met or exceeded

**Vs 93% in Wave 15 (Sept 2024)**

**Those who visited NI felt their trip...**

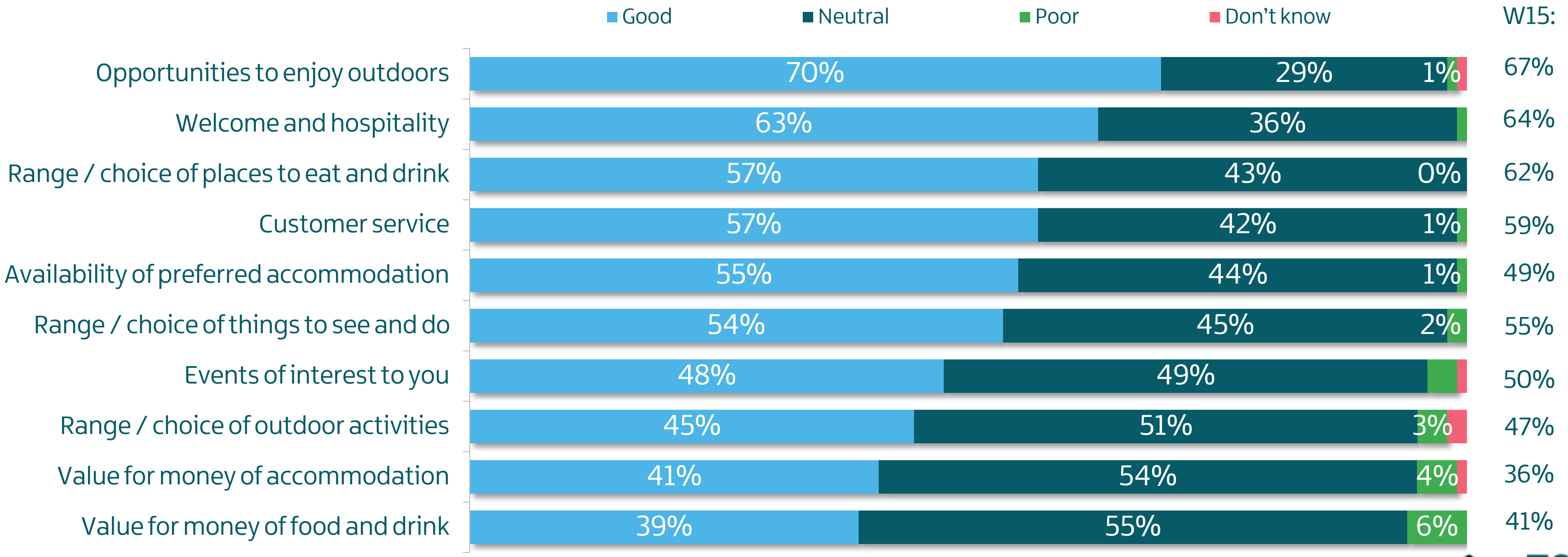



N = 102 (any break in NI in 2025, inc. day trips)

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

# Rises in accommodation VFM/availability rating, as well as opportunities to enjoy outdoors

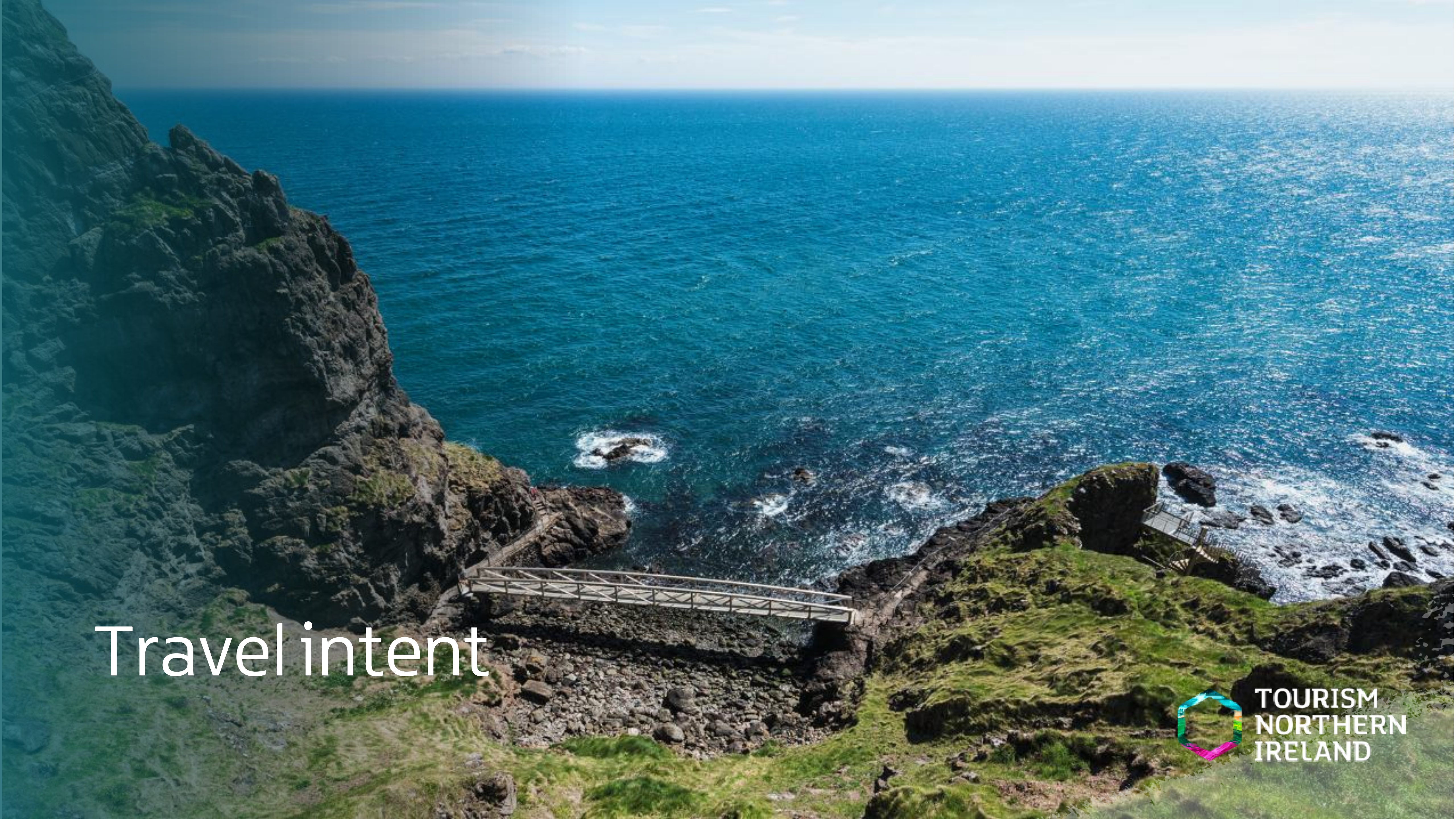
**Based on your recent trip(s) in NI, how would you rate the following...**



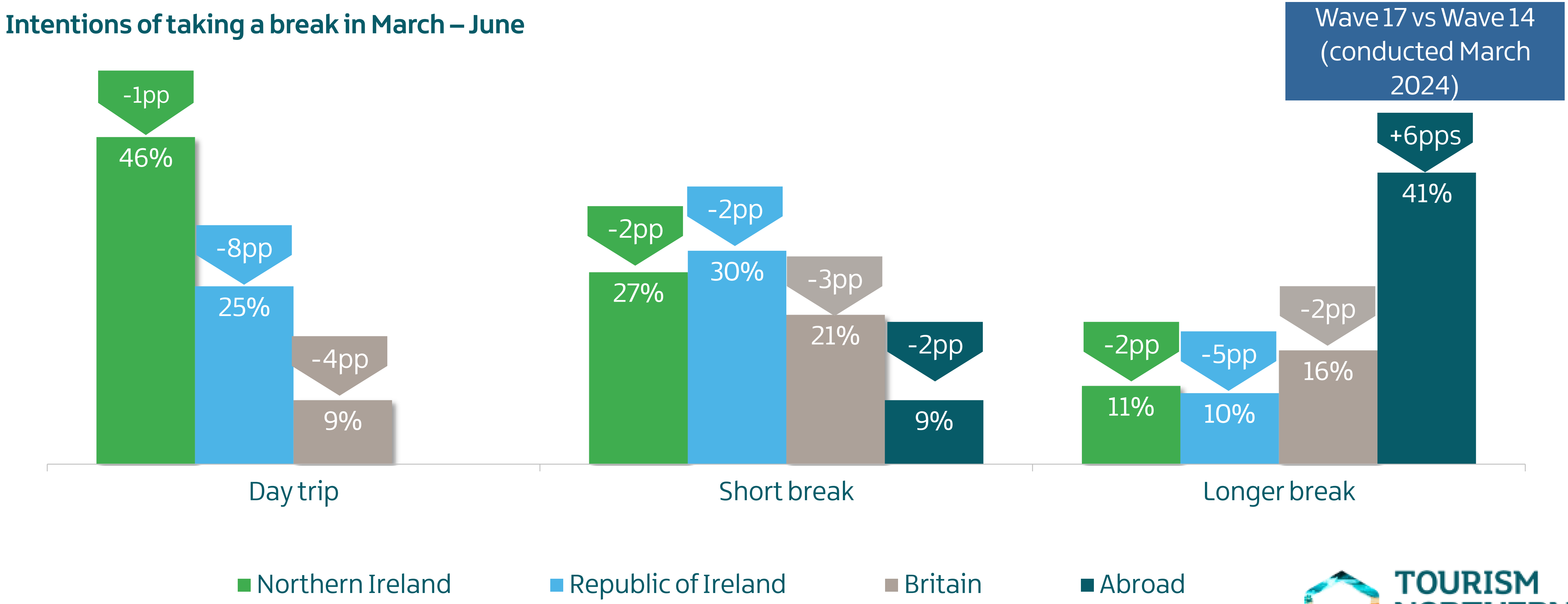

N = 271 (Those who took a break in NI since 2024)

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

# Travel intent



# Trip intentions for NI very slightly down; ROI considerably down for day trips whereas longer breaks abroad increase

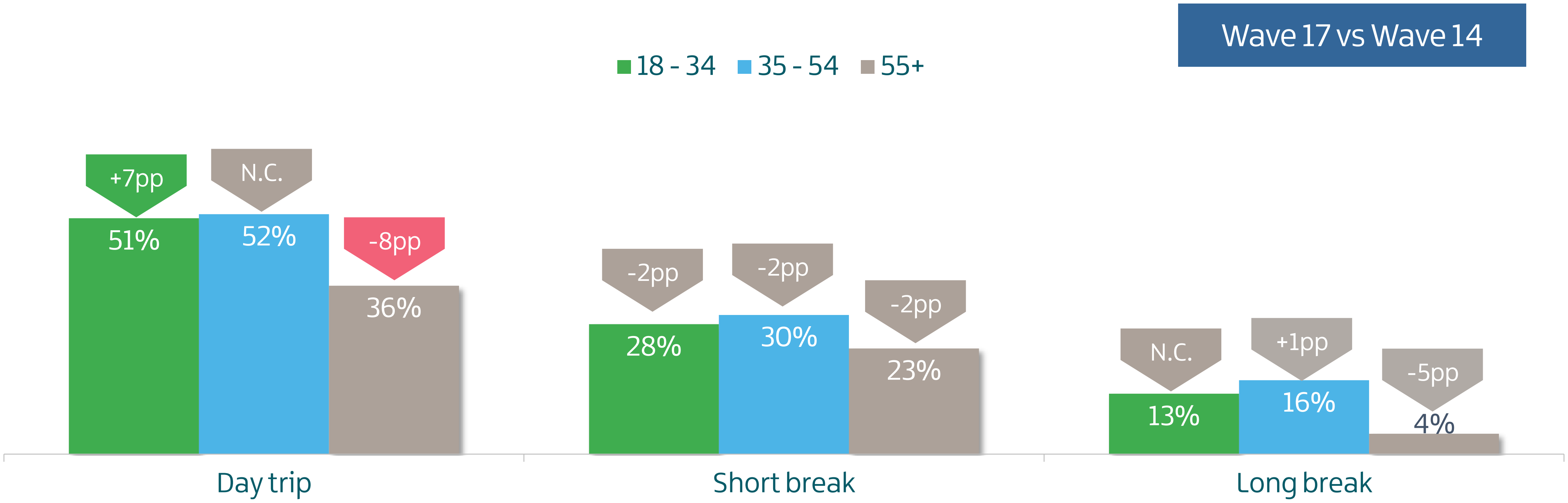



N = 400

E1b. Would you consider taking a leisure day trip / short break of at least 1-3 night s/ 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)?

# Day trip intentions increase with under-35s; drops across the board among over-55s

## Trip intentions of taking a break in NI in spring 2025 – by age



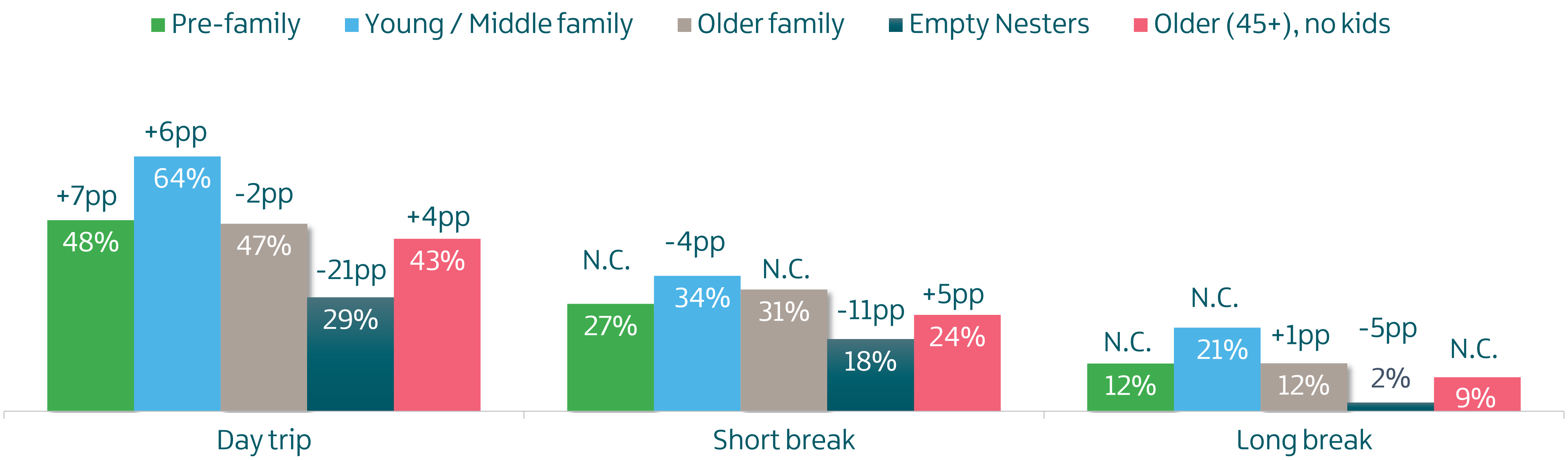

N = 18 – 34 (120) 35 – 54 (148) 55+ (132)

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 (March to June)?

# Day trip intentions increase with pre- and early family segments but big decreases across the board with Empty Nesters

Change vs Wave 14 (March 2024)

**Trip intentions of taking a break in NI in spring 2025 – by life stage**

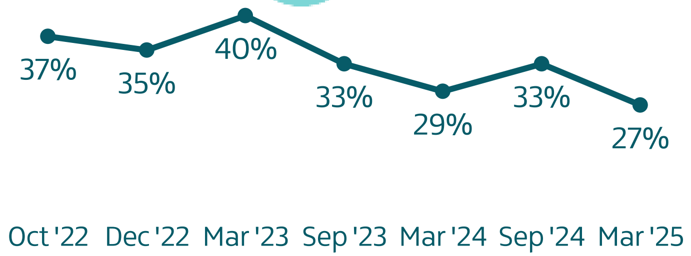



N = 76 (Pre), 75 (Young/Mid), 95 (Older), 74 (Empty), 79 (Older, no kids)

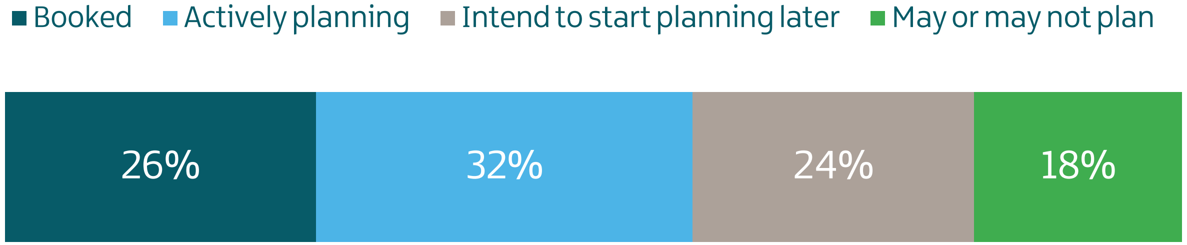
E1. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March to June)?

# Short break intentions drop slightly – overall negative trend over past 2 years. Over half actively planning

**27%** are considering a short break in NI in Apr-June

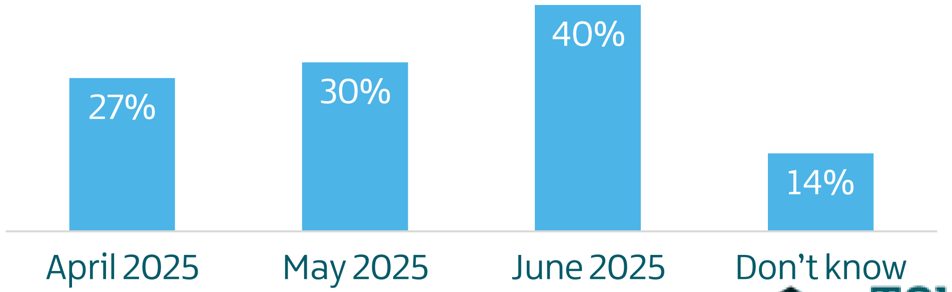



## Status of short break – have they booked?




**58%** are actively planning or have booked a trip in NI – **16%** of the total sample

Short break planned for

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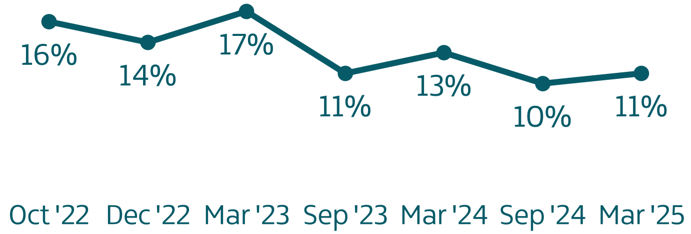
N = 400 / 107 considering short break / 88 planning a short break

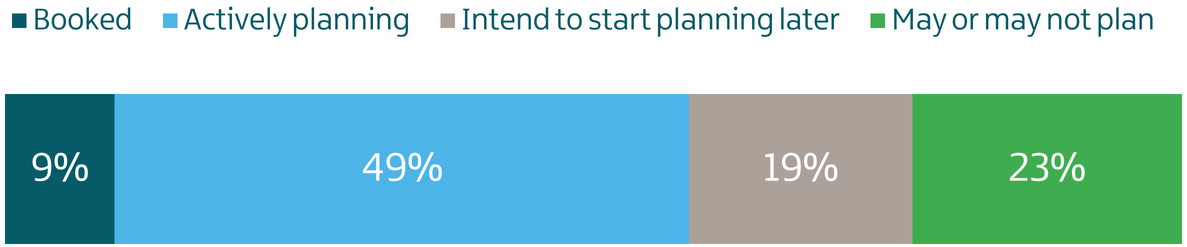
E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March to June)? / E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland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

# Long trip intentions down on March 24 but slight recovery vs. September 2024

**11%**
are considering a long break in NI in Apr - June

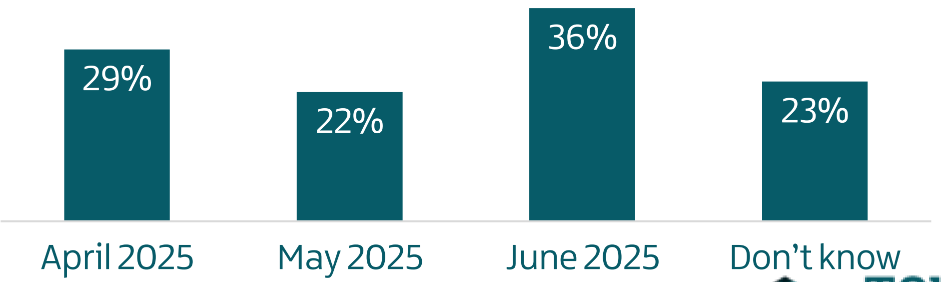



## Status of long break – have they booked?




**58%** are actively planning or have booked a trip in NI – **6%** of the total sample

## Long break planned for

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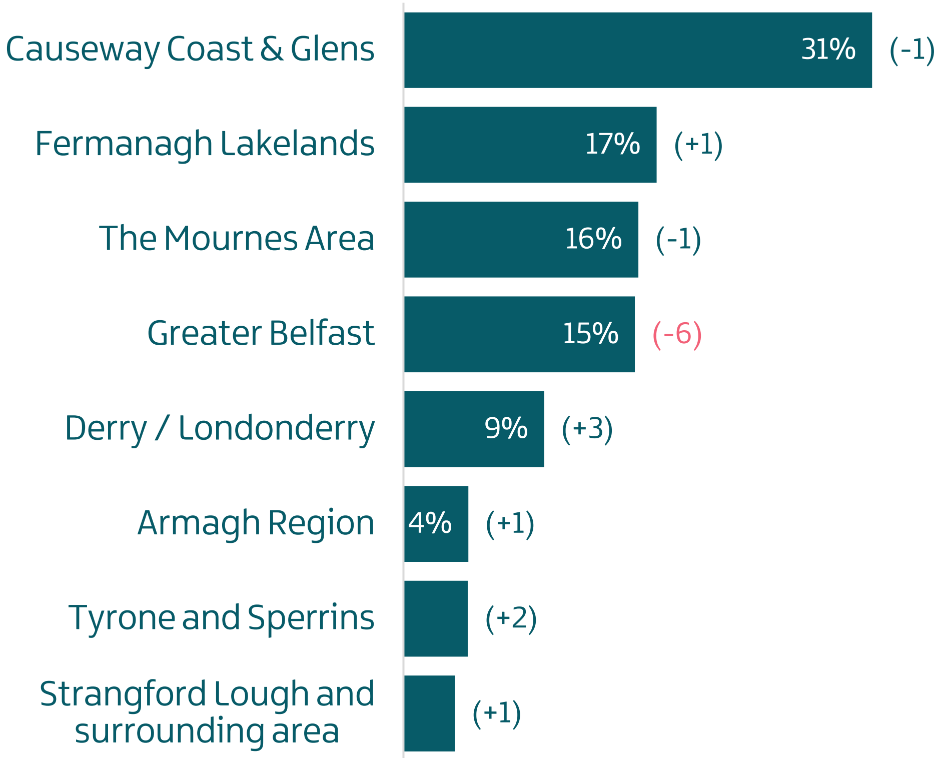
N = 400 / 45 considering long break / 34 planning long break (caution low N)

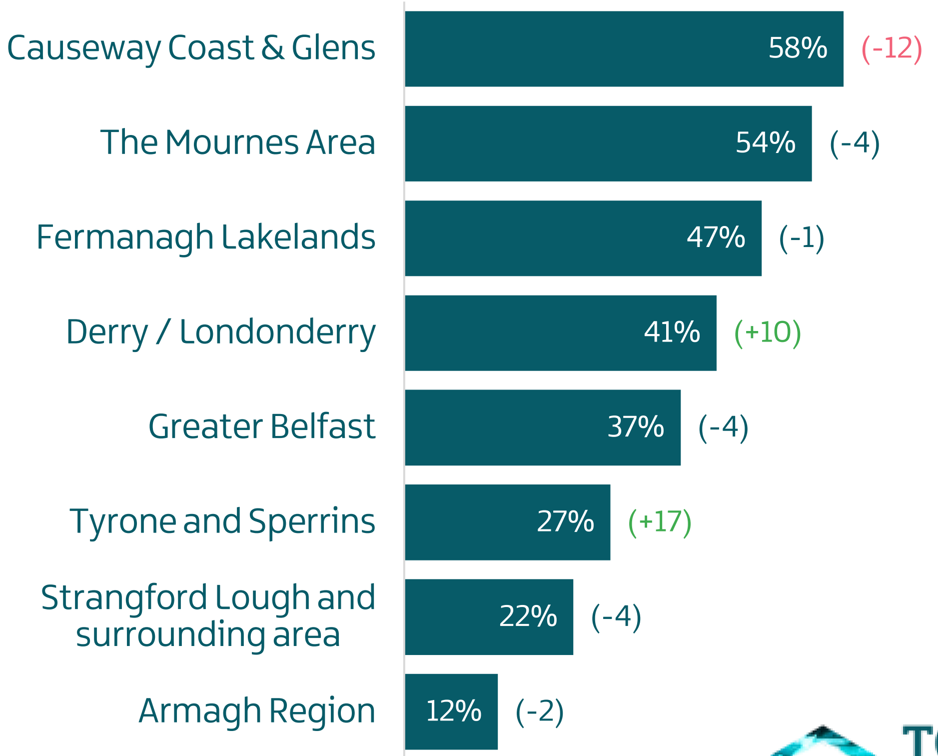
E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March to June)/ E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland/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

# A few notable shifts vs. W15 – Belfast drops whereas Derry/Londonderry improves consideration notably

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




## Destinations in top 3 consideration for next trip (vs Sep)

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N = 96 those planning a long or short break

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

# Locality, affordability and plenty to see and do noted as reasons to take another trip to NI

## Reasons for revisiting NI

### Ease of Access

Local and easy to travel to with young children.

Easy to get to by car and lots of lovely scenery.

### Affordability

It costs too much to go abroad for my whole family.

Reasonably priced holiday during school holidays.

### Scenery, events and attractions

To enjoy the scenery around the north coast.

Just for a break to Belfast to visit art galleries and catch up with family.

Girls trip away, booked a concert.

I had such a great experience on my last visit – the scenery, the people and the food really stood out.

I want to visit the Belfast castle.

Want to visit the city / go shopping.

### Quality Time with Family / Friends

Loved my last trip away with my family and friends and would love to be able to do it again.

I love having things planned with my family to look forward to.

### A Getaway

Love the country, I need a break away.

To relax and unwind and soak up the NI atmosphere.

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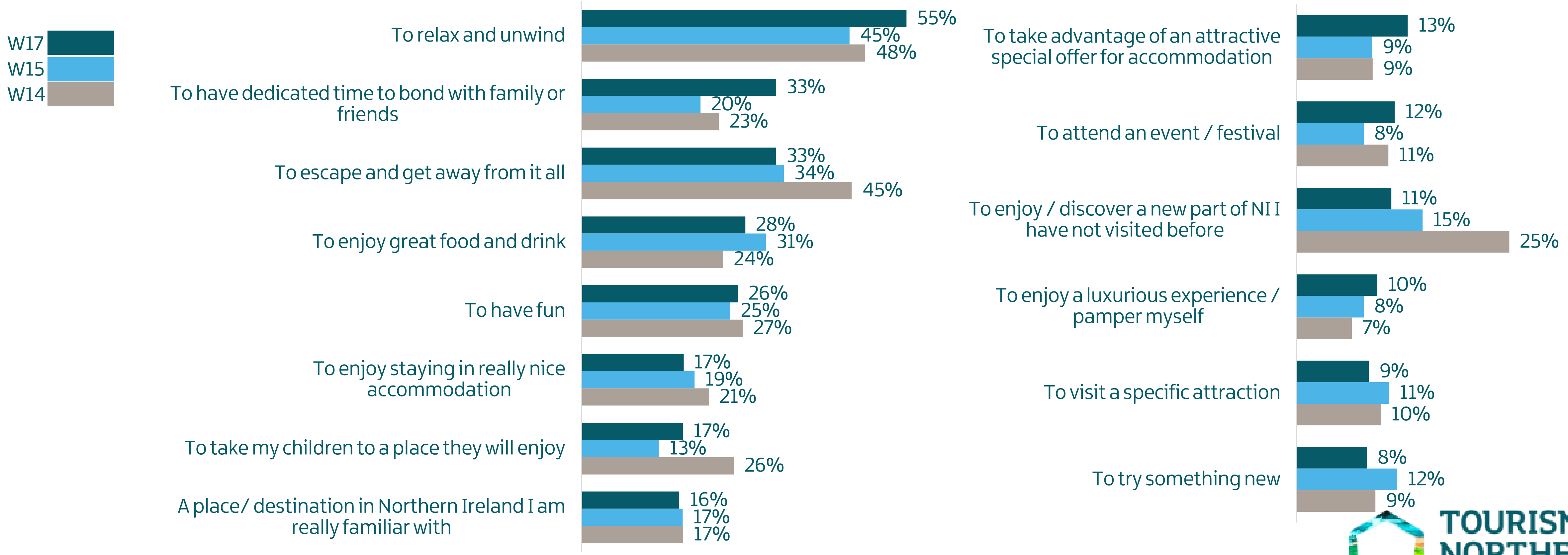
CB1. You mentioned you plan to take another trip in Northern Ireland in the next 6 months. What has prompted you to take another trip in Northern Ireland?

# Relaxation increases by 10pps as trip motivation – also big increase for family / friend bonding time

## Trip motivations (long and short combined)



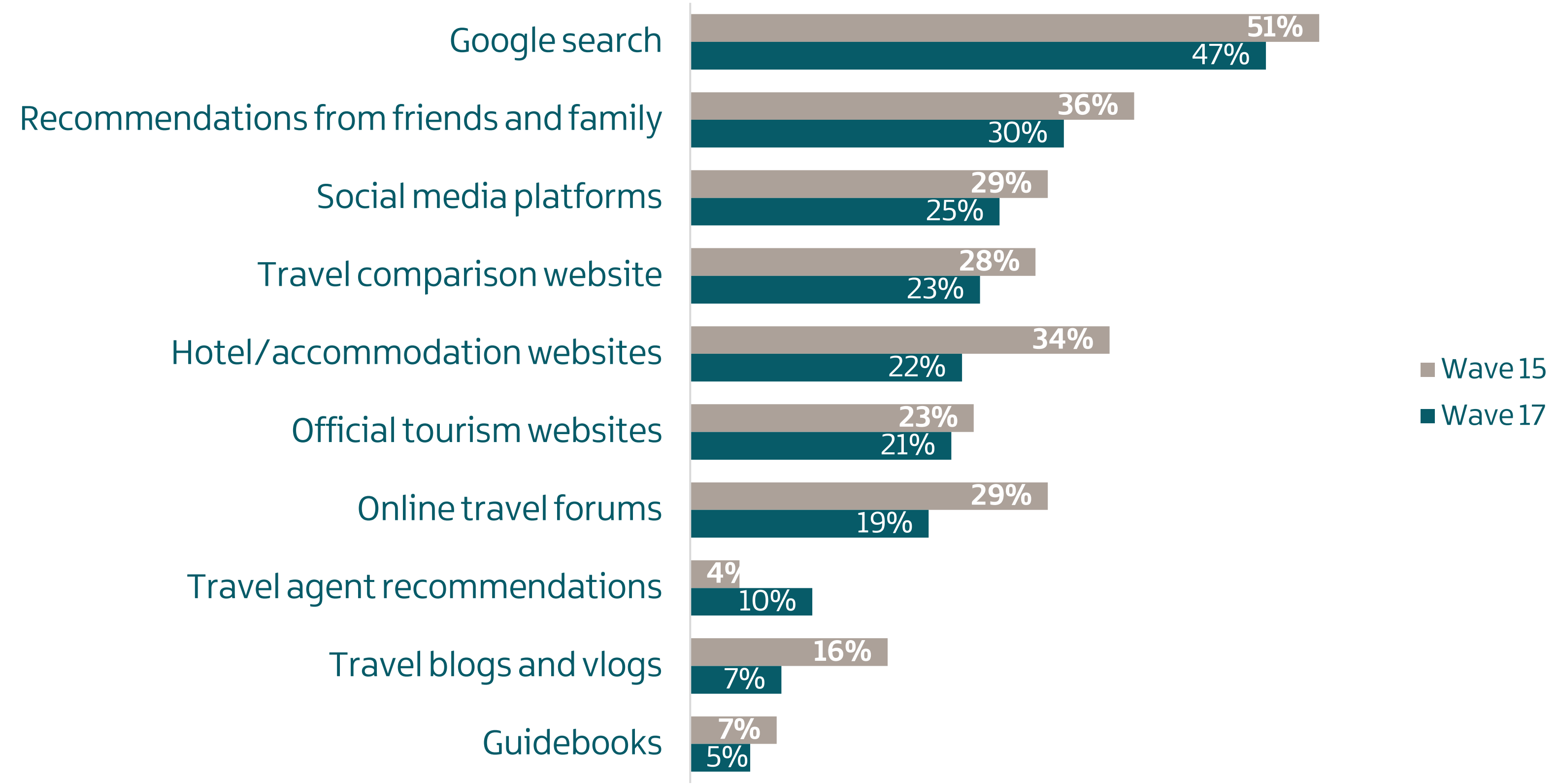

TOURISM NORTHERN IRELAND

N = 96 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?

# Drop across the board in research sources for trips; Google search remains at top

## How they plan to research their trip




Booking.com is the main choice of comparison site – 76% doing research via this site. 19% are doing research via Trivago

N = 96 planning long or short break (excl. "may or may not plan")

E10. 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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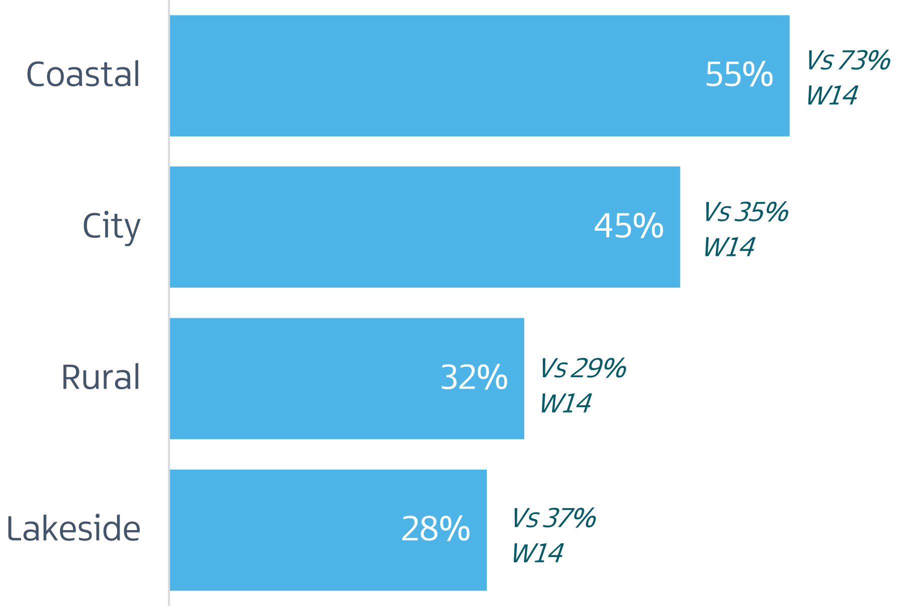
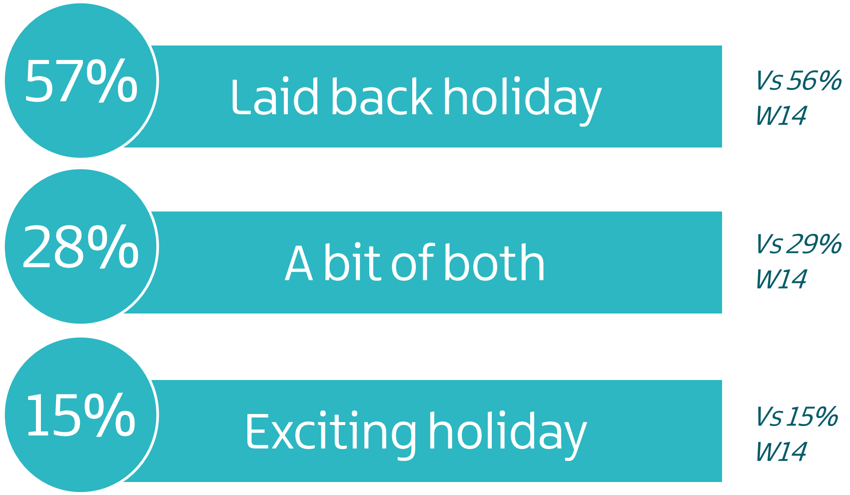
# Increase in city break intentions vs. March 2024 – possibly down to younger demographic planning trips

## Type of break preferred




## Type of trip preferred

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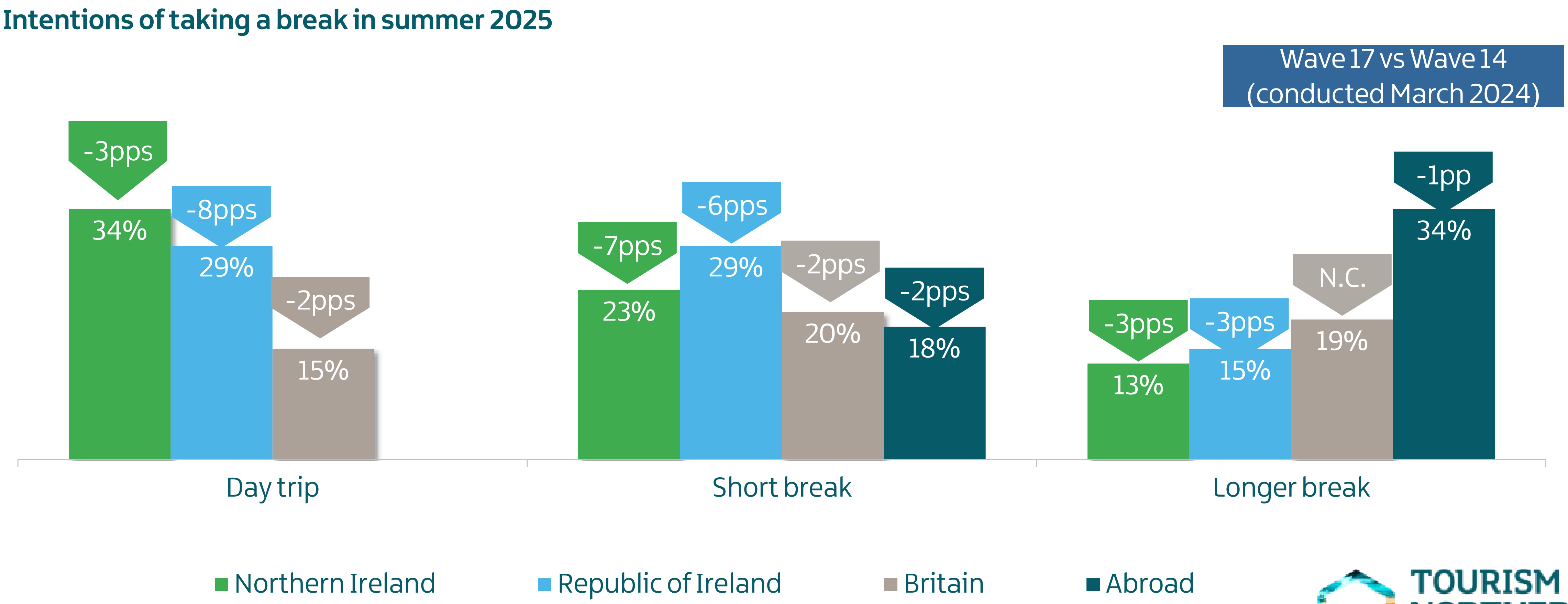
N = 96 planning long or short break (excl. "may or may not plan")

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?

# For summer 2025, decreases seen for both NI and ROI trip intentions – short break intentions in particular drop considerably

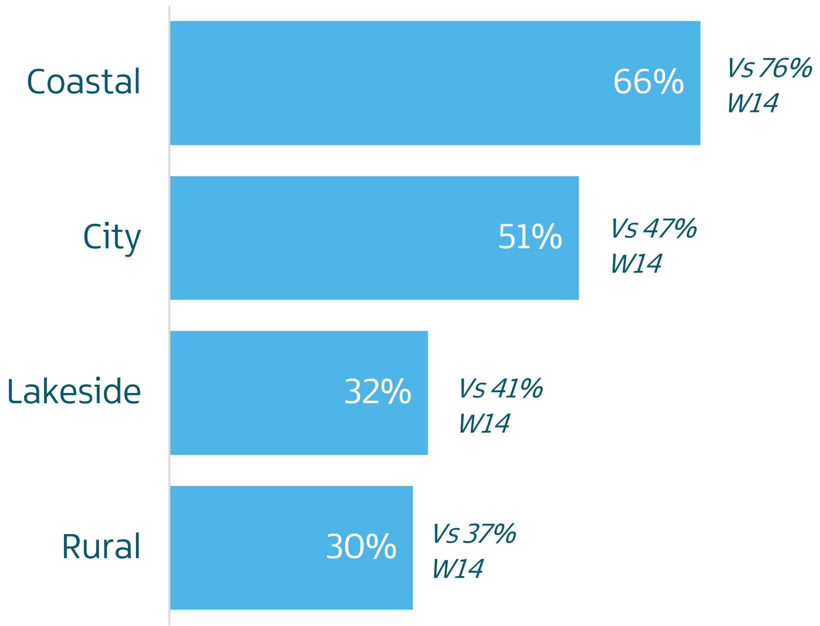



N = 400

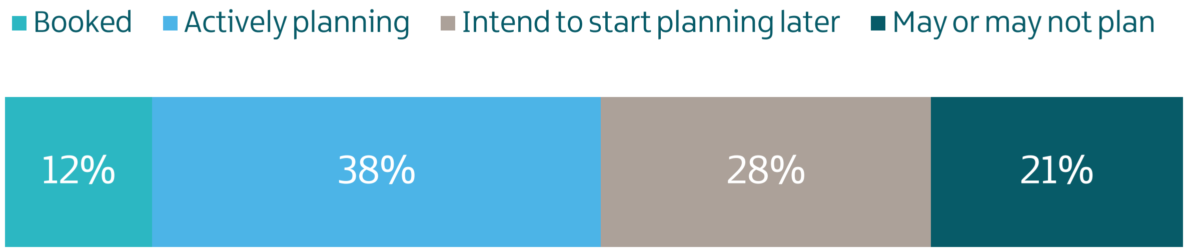
E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in summer 2025 (July to August)?

# Increase again seen in number of people considering city breaks. Across break types, about half actively planning

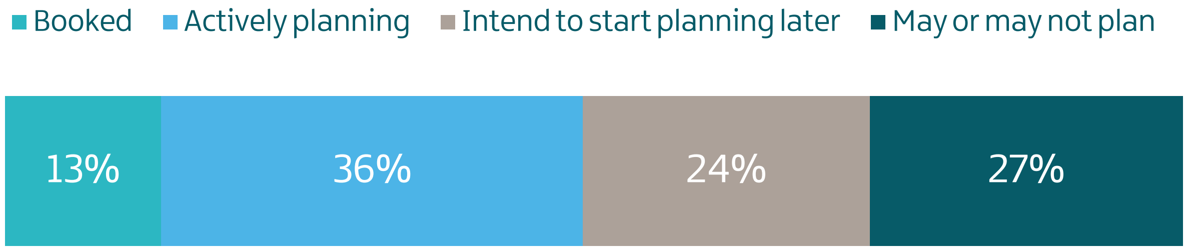
## Type of break considered




## Amount of short break planned




## Amount of long break planned

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N = 100 considering long or short break in summer 2025

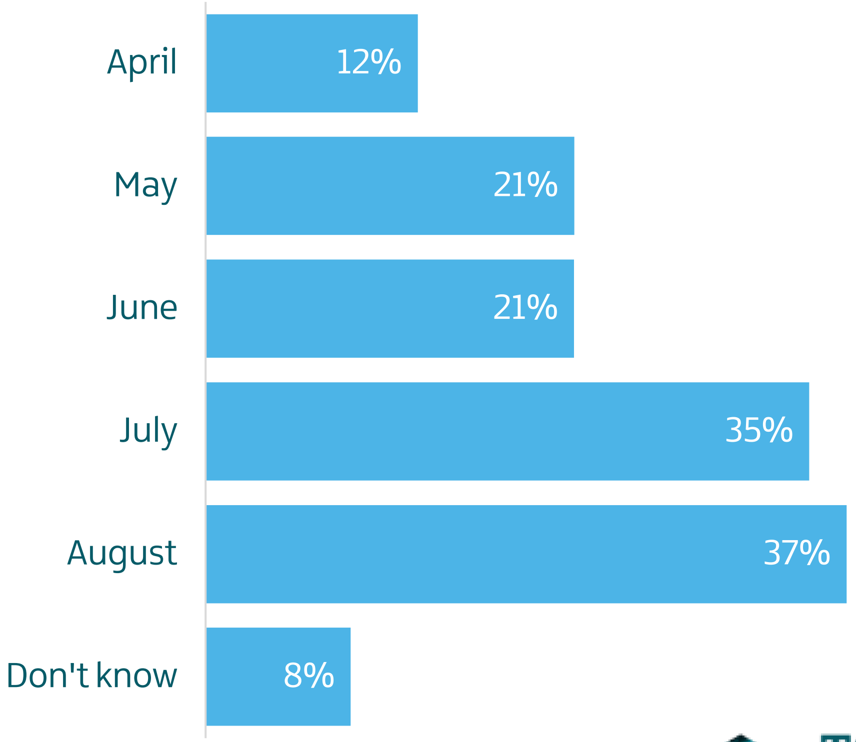
E24c. Which of the following destination types would you consider in summer 2025? / E25 Thinking about the short/long trip(s) you said you would consider for summer 2025 in Northern Ireland, have you booked or thought about planning this short/long trip?

# Slight increase in number considering trips abroad in next 6 months; mainly planned for summer

**50%** of total sample are considering a break abroad in the next 6 months
*(vs. 48% W14)*

**67%** of this cohort are actively planning or have booked their trips
*(vs. 67% W14)*

## When trips abroad are planned for




N = 201 considering trip abroad

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E14. You mentioned that you are considering taking a break abroad in the next 6 months (March to August). 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 (March to August)?

# Value for money

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# VFM perceptions remain at similar levels for both NI and ROI, but NI continues to be rated more positively than ROI and GB

## Value for money perceptions

| | Poor value for money | Good value for money | Net Score* Mar ‘25 (W17) | Net Score* Sep ‘24 (W15) | Net Score* Mar ‘24 (W14) |
|---|---|---|---|---|---|
| Spain | 5% | 53% | +48 | +46 | +50 |
| Portugal | 6% | 44% | +38 | +41 | +42 |
| Italy | 20% | 27% | +7 | +6 | +13 |
| Northern Ireland | 26% | 30% | +4 | +6 | +10 |
| France | 26% | 22% | -4 | -1 | -8 |
| Great Britain | 38% | 19% | -19 | -8 | -13 |
| Republic of Ireland | 45% | 18% | -27 | -31 | -23 |

**VFM Net Score is calculated by subtracting the % who rated poor VFM from the % who rated good VFM*

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N = 400

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

# Shopping and accommodation improve for VFM – with alcohol and paid activities taking a hit

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

| | Reasons they think NI is poor value for money | Reasons they think NI is good value for money | Net score Mar '25 | Net score Sep '24 | Net score Mar '24 |
|---|---|---|---|---|---|
| Shopping | 15% | 41% | +26% | +23% | +17% |
| Meals Out | 30% | 43% | +13% | +15% | +24% |
| Public Transport | 26% | 35% | +9% | +6% | +6% |
| Accommodation | 32% | 39% | +7% | +1% | +12% |
| Paid Attractions | 30% | 29% | -1% | +9% | +4% |
| Paid Activities | 25% | 20% | -5% | +1% | +4% |
| Alcohol | 40% | 22% | -18% | -12% | -7% |
| Petrol / Diesel | 36% | 17% | -19% | -20% | -34% |

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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?

# Cost of living

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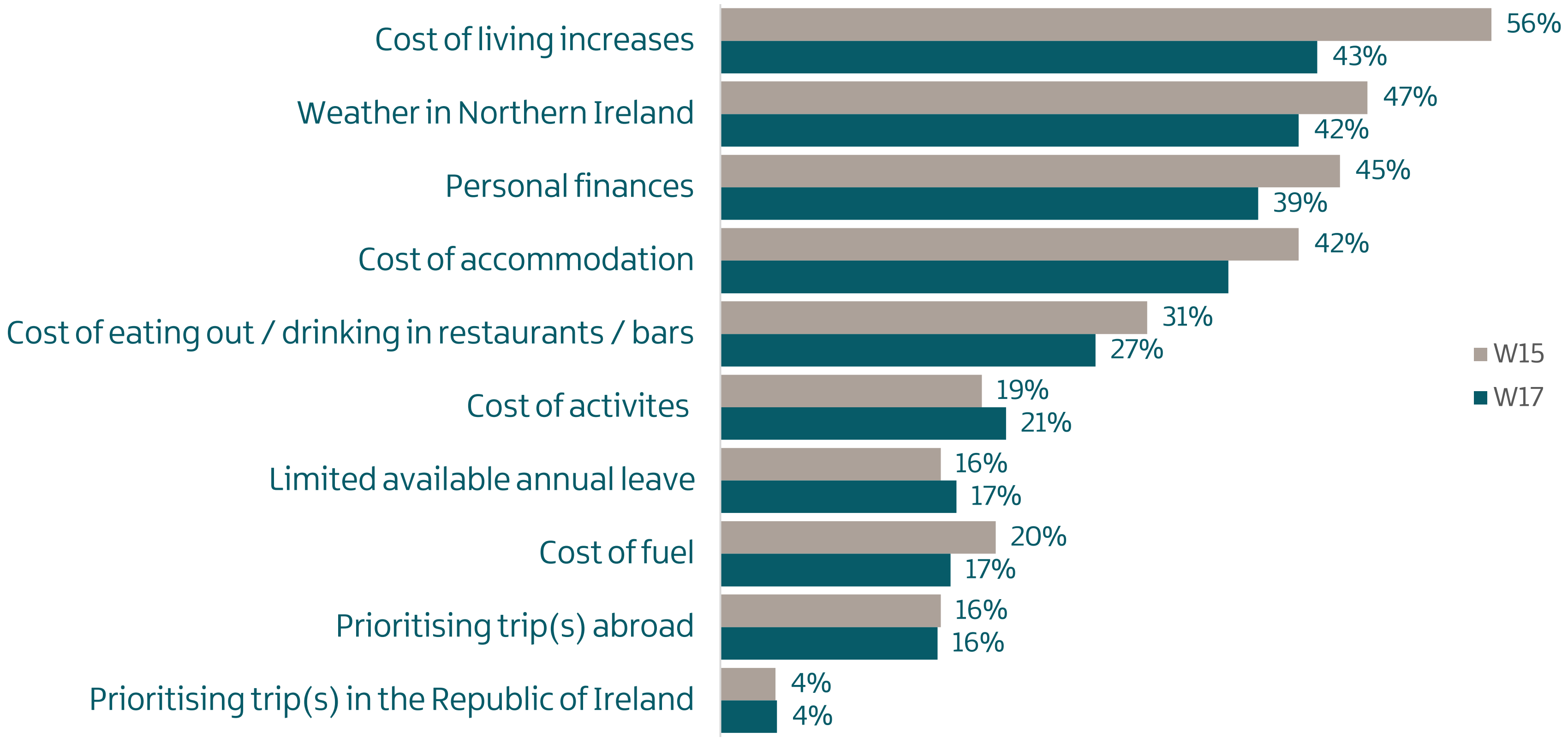
# There is a general reduction in barriers to taking a holiday in NI compared to w15

### What could stop them taking a break in NI




Those aged 35 – 54 are more likely to say cost of fuel (24%) and cost of activities (29%)

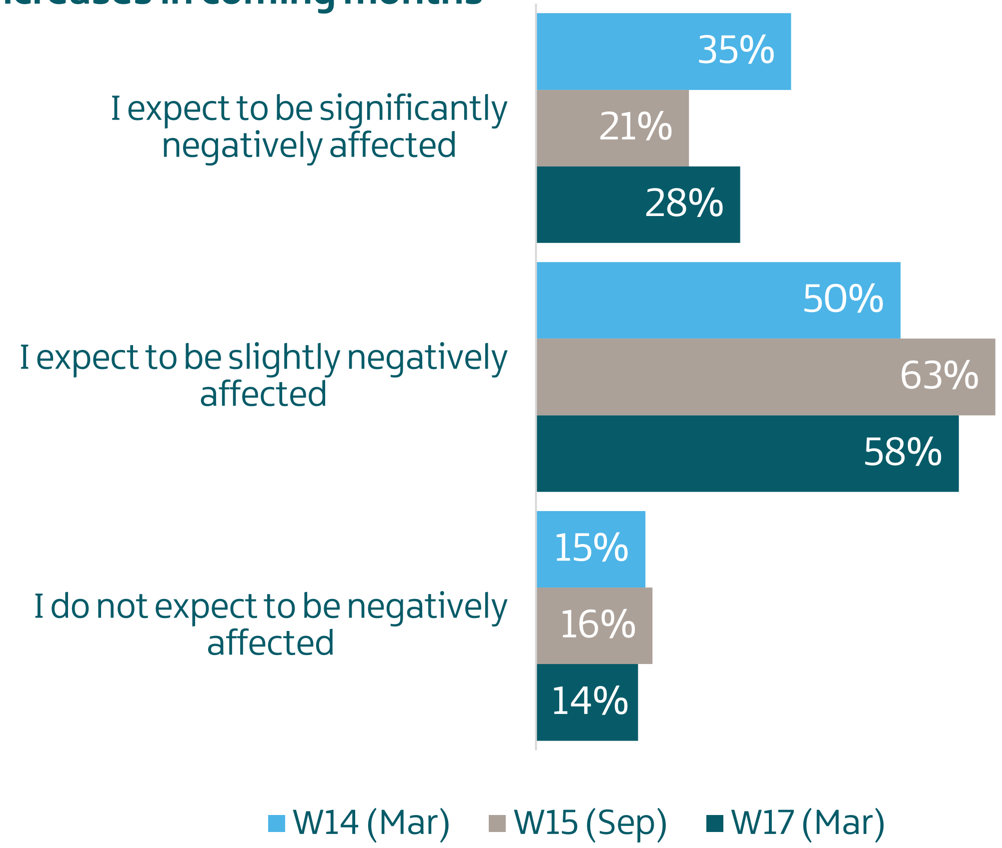
N = 400

F0. 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?

# There is a rise in the number of people who think they will be significantly affected by the cost of living

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

**86%** expect to be affected by cost of living increases




35-54 are most likely to be significantly affected (38%)

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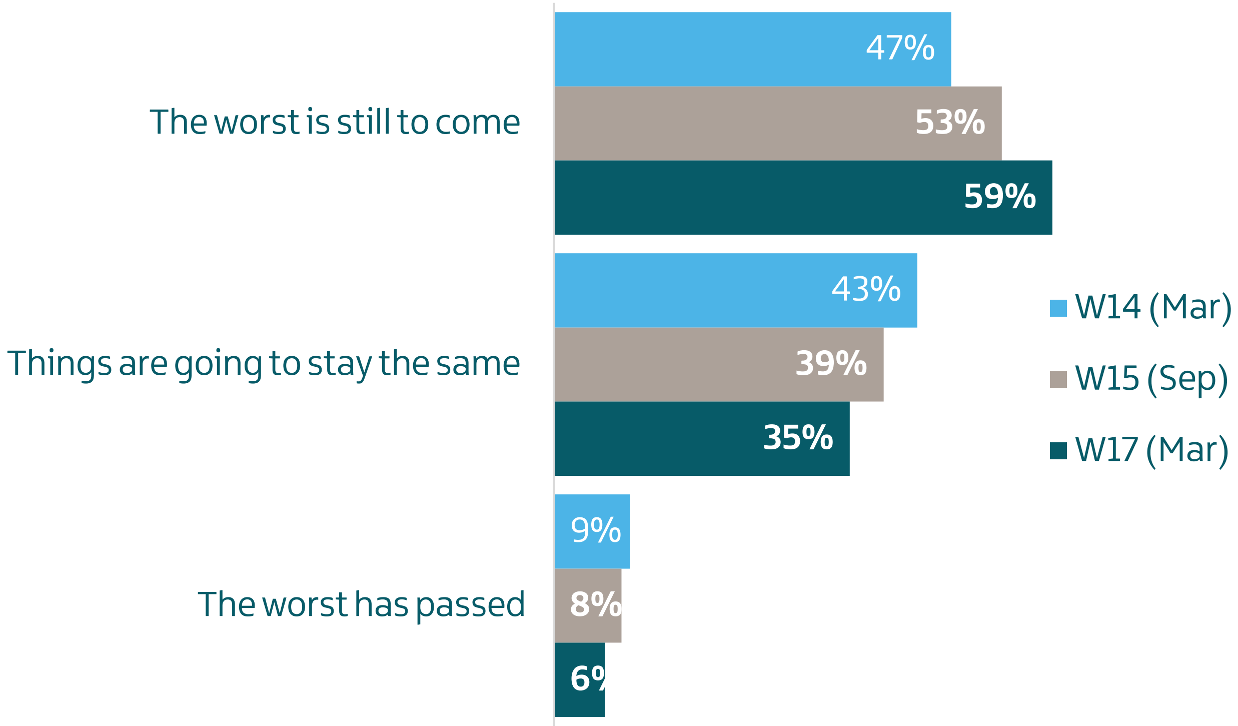
N = 400

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

# With a further increase in the number saying that the worst is still to come with regard to the cost of living

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

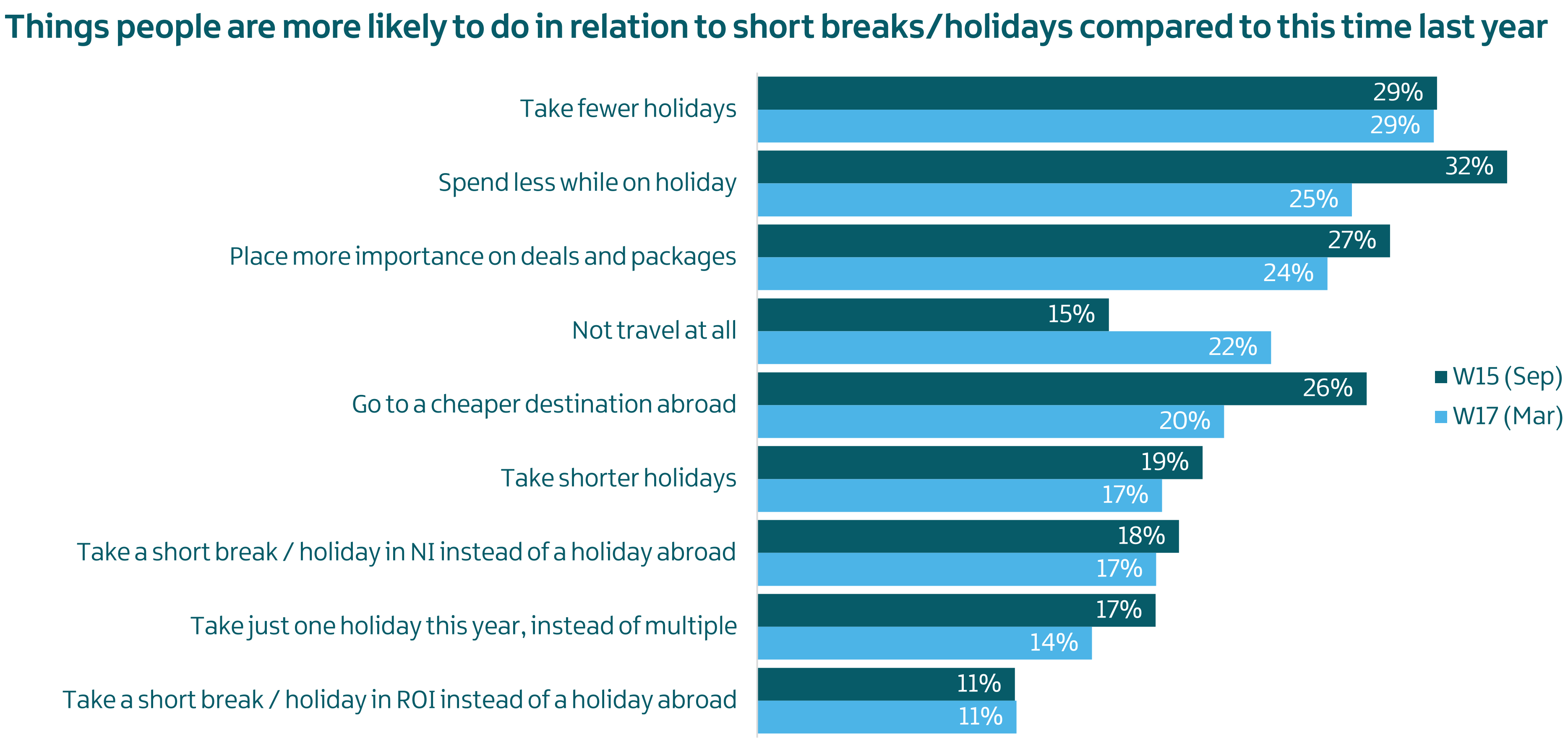



Under 34s are most likely to say the worst has passed (10%)

N = 400

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?

# There is a considerable rise in people claiming they won't travel at all compared to September




35 – 54 are more likely to be taking shorter holidays (23%)

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?

# More people are considering not taking any day trips at all in NI compared to September


55+ say they are more likely not to take any day trips at all (21%)

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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# Summary of findings (NI Market)

| | |
|---|---|
| Early 2025 performance | ❖ Domestic trip numbers within NI remain largely consistent with early 2024 levels.<br>❖ Visitor satisfaction is strong, with more domestic consumers feeling their NI trips exceeded expectations.<br>❖ Opportunities to enjoy the outdoors and the welcome / hospitality were particularly highly rated. |
| Travel intentions | ❖ Domestic travel intentions are softening for both spring and summer, with interest in longer overseas trips growing in the next three months.<br>❖ Summer 2025 sees a more significant hit – especially for NI short breaks which are down 7pps. In this case, all locations, including abroad, are stable or drop vs. this time last year, indicating lower overall appetite for travel in summer.<br>❖ Relaxation and family / friend bonding time are key for those planning trips over the coming months. |
| Value for money | ❖ NI is still seen as offering better value than ROI or GB, though value perceptions among NI consumers have very slightly declined.<br>❖ For those who took a break in NI in 2025, satisfaction with the cost of accommodation has improved since the last wave. |
| Cost of living and Outlook | ❖ Overall, the number of NI consumers saying they will be significantly impacted by cost-of-living increases.<br>❖ Increasing economic pessimism may reduce travel plans — though strong visitor experiences support repeat trips. |