Tourism Northern Ireland Consumer Sentiment Research

ROI Market – Wave 17

April 2025

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Research background

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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.

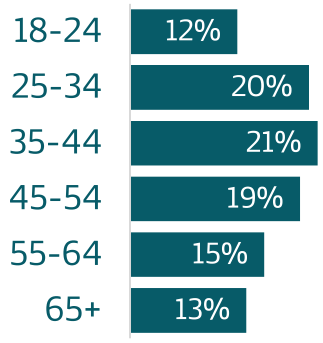
Objectives:

- 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.

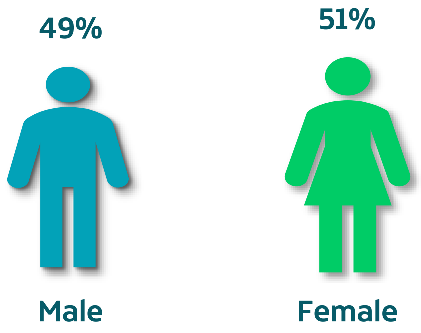
** Where applicable, comparisons are made to Wave 14, as this was conducted at the same period in 2024, and/or Wave 15 which was the last regular wave of consumer sentiment research. Wave 16 was an internal piece of research in which different metrics were tracked.*

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

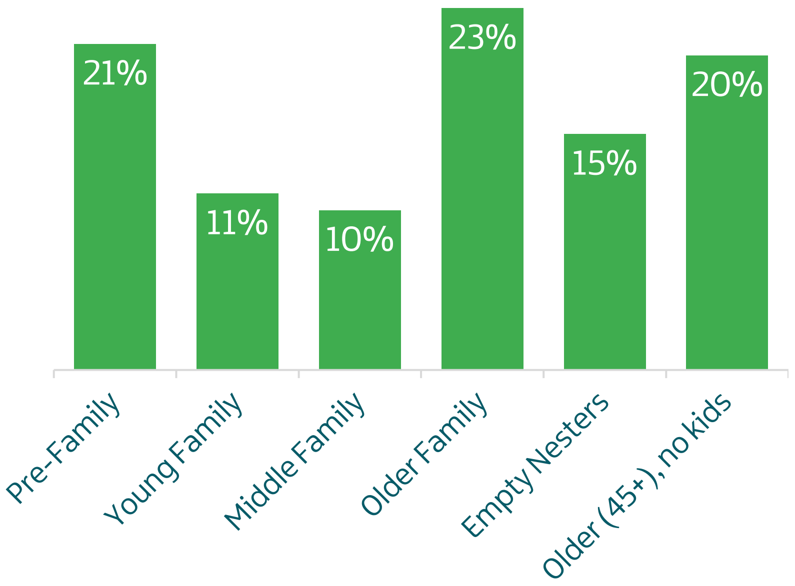
Age



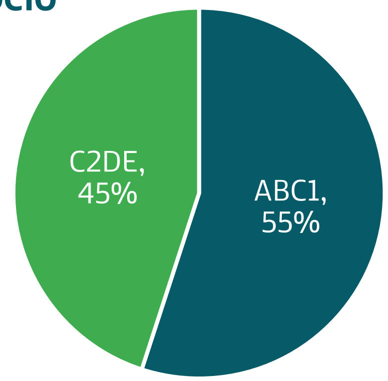
Gender



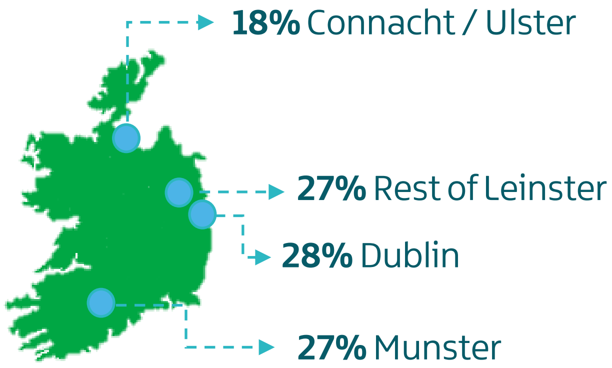
Lifestage



Socio



Region



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Fieldwork was conducted between 17.03.25 and 05.04.25

Contents

Travel experiences

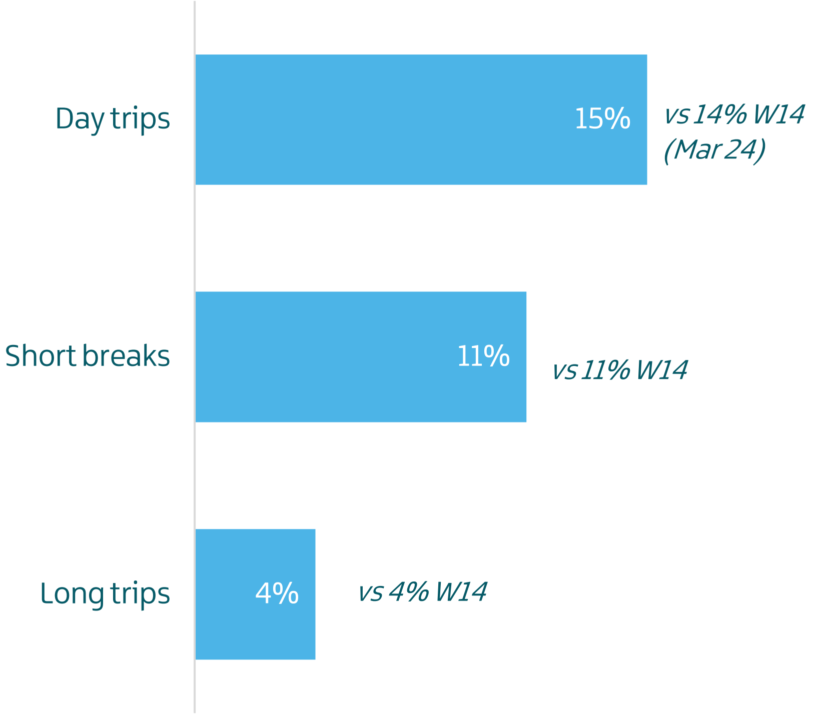
Increase in number taking trips abroad this year vs last year. Number of short breaks in NI consistent with early 2024

13%

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

Wave 14 (Mar 2024): 13%

% of total sample who took a trip to NI



Other than NI…

31% took a break in ROI
vs 32% in W14

33% went abroad
vs 22% in W14

45% didn't travel at all
vs 49% in W14

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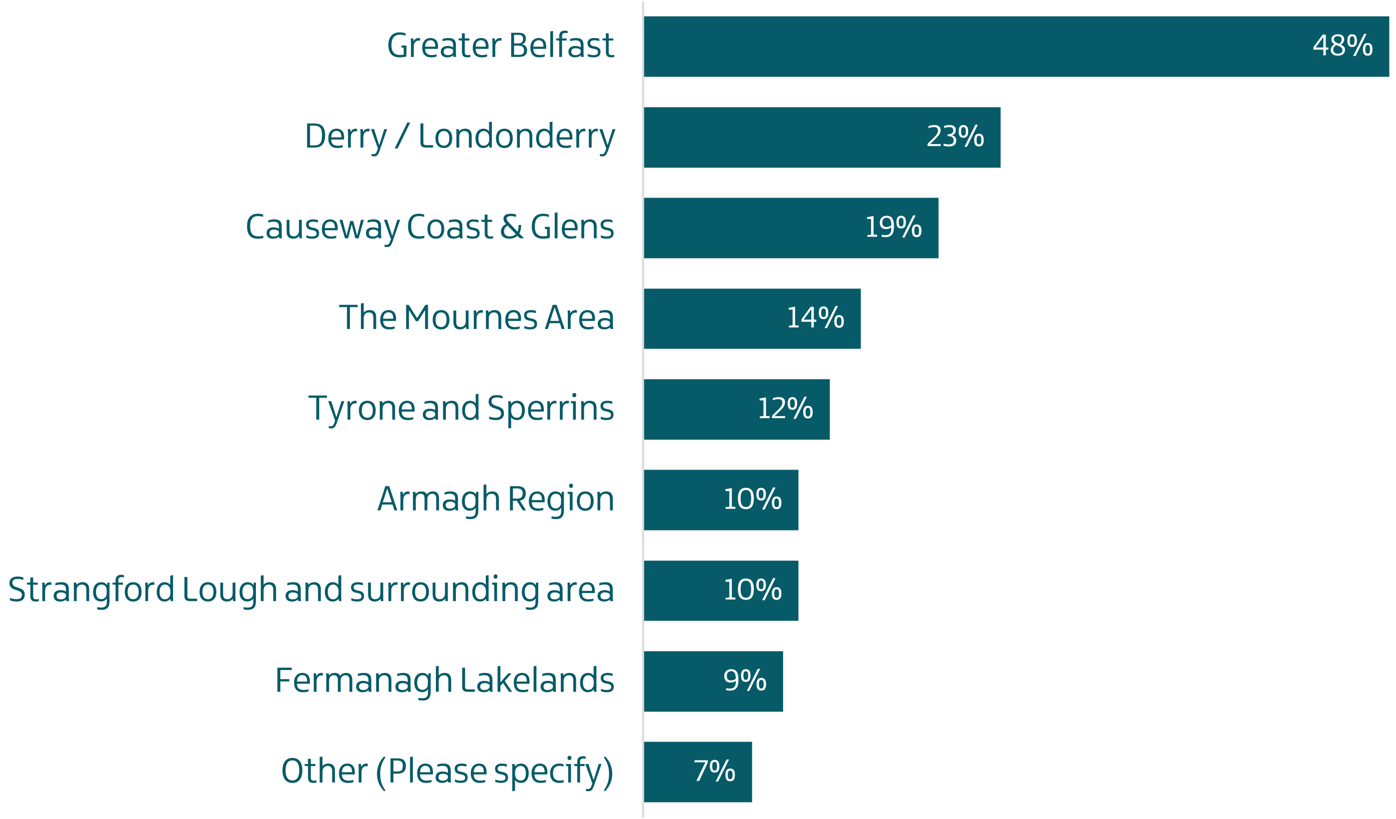
N = 750 D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes since the start of January 2025?

Belfast remains the most visited place in 2025 so far

Where they visited in NI in 2025



N = 169 who took any trip in NI in 2025

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

Visiting local shops, restaurants and pubs / bars were popular activities during NI trip

What they visited / experienced in NI in 2024/25

18-34 more likely to have visited city sightseeing tours (38%)

Older families (with children aged 12 and above) more likely to have taken scenic/interesting walks (46%)

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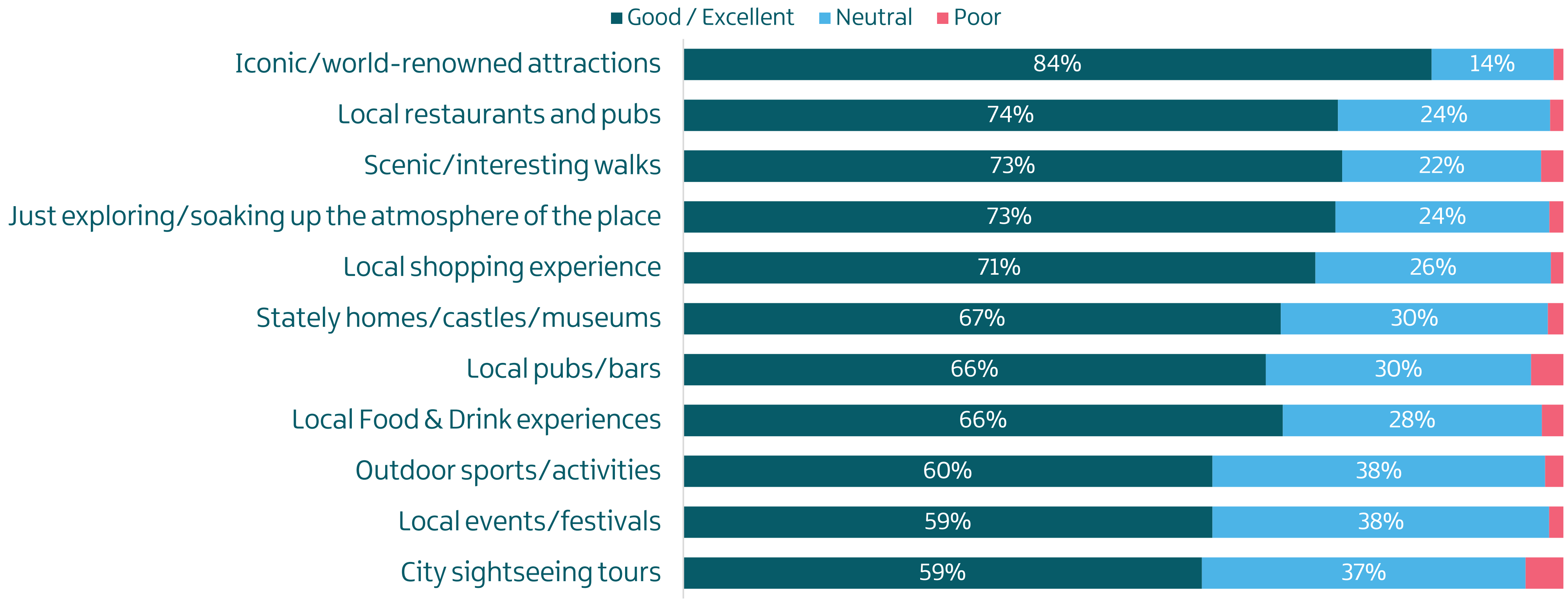
N = 346 took a short or long break in NI in 2024/25

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

Attractions and food & drink in particular were rated highly

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



N = between 60 and 144 (depending on which activities engaged in)

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

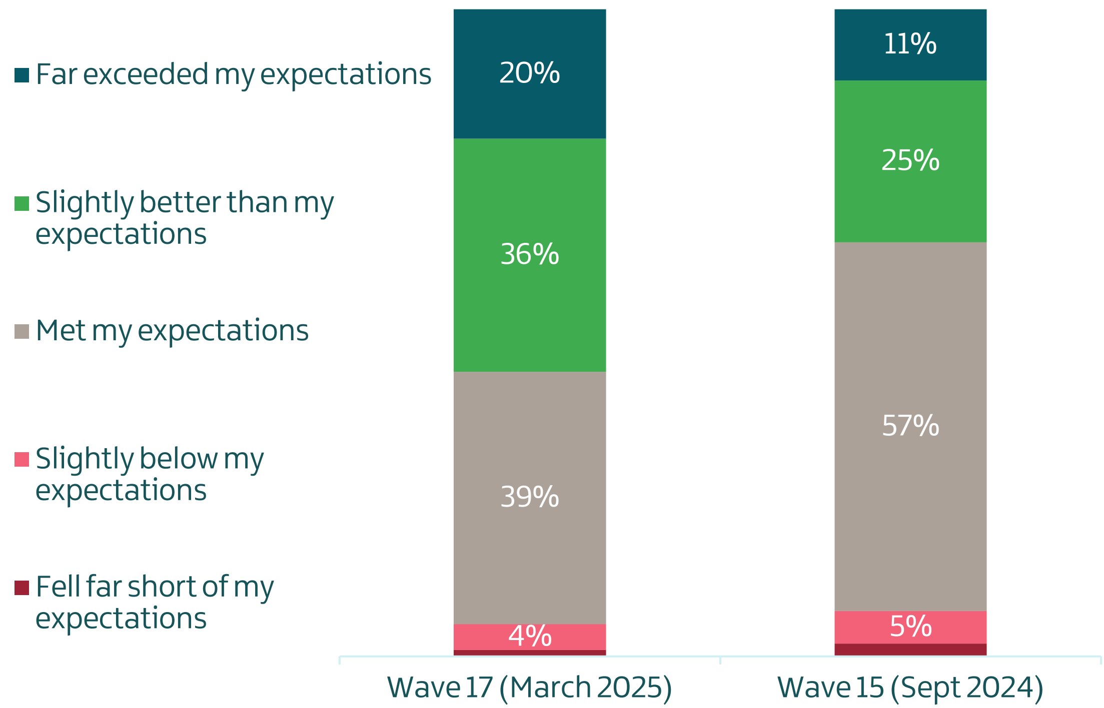
Expectations continue to be met or exceeded – increase in number exceeded vs. September 2024

95%

had their expectations met or exceeded

vs 93% in Wave 15 (Sept '24)

Those who visited NI felt their trip...

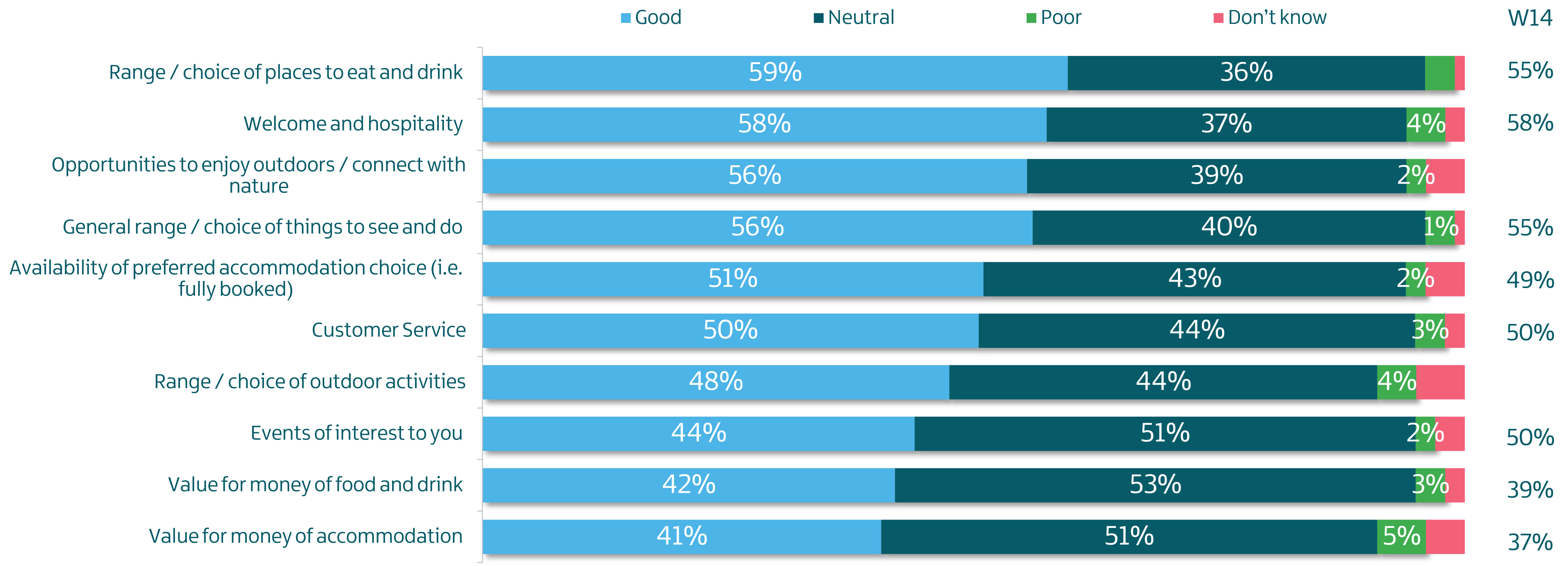


N = 169 (any break in NI in 2025, inc. day trips)

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

Range of places to eat and drink, as well as welcome & hospitality highly rated

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



N = 346 (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

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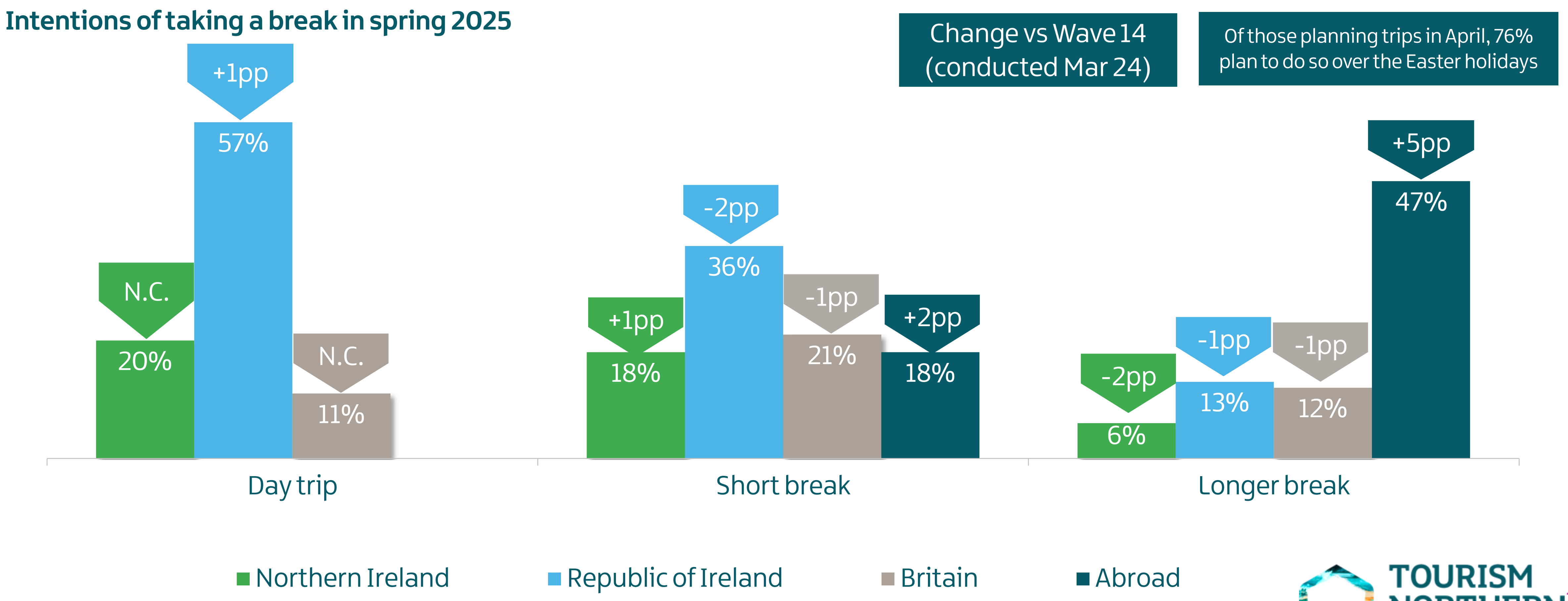
Most trip intentions stable vs. March 2024, although slight drop in NI long break intentions. Trip abroad intentions up



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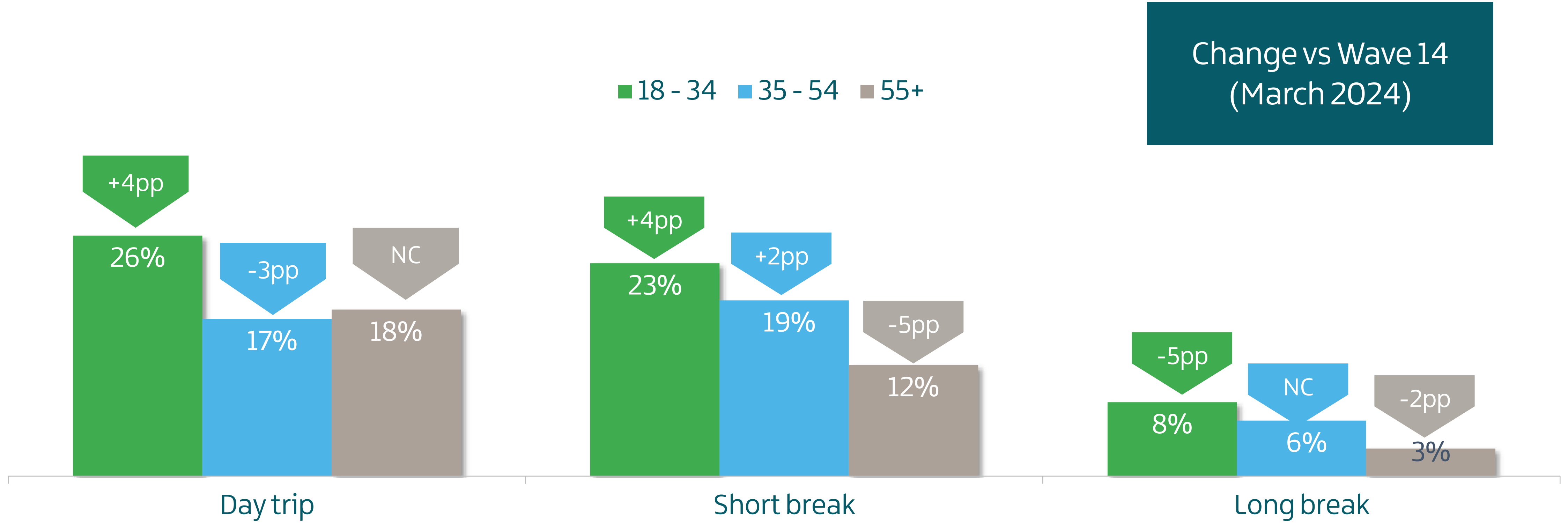
N = 750

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

Under-35s see increases for short break / day trip intentions but down for long breaks; short break intentions drop for over-55s

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



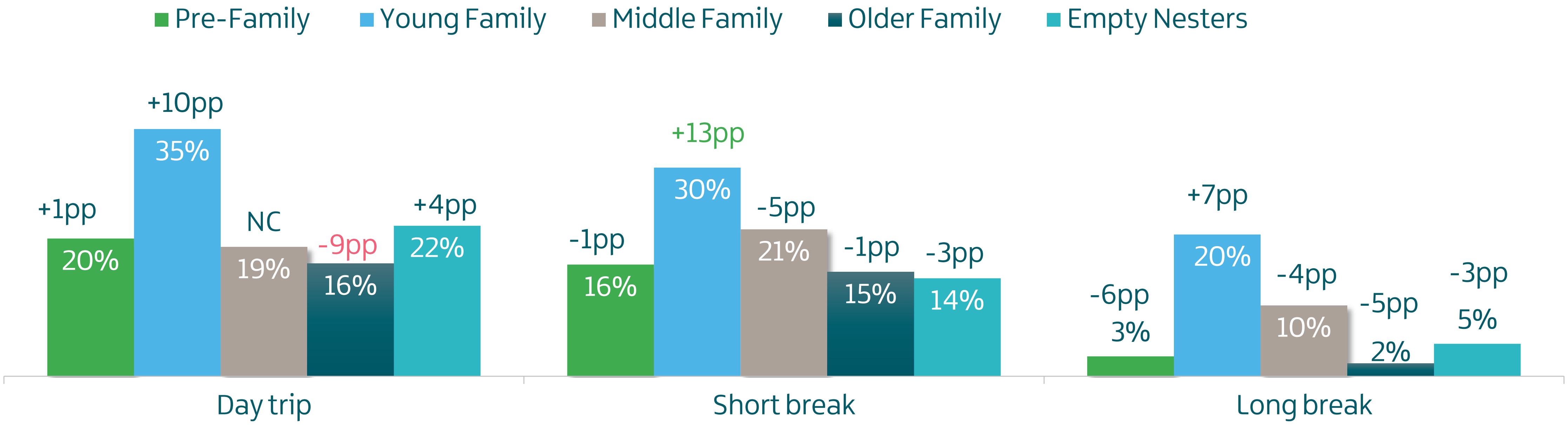
N = 18 – 34 (240) 35 – 54 (300) 55+ (210)

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 (March to June)?

Increase in young families planning short breaks (and increase in day trips too). Older family day trip intentions drop

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

Change vs Wave 14 (March 2024)



Green = sig. increase vs. W14; red = sig. decrease

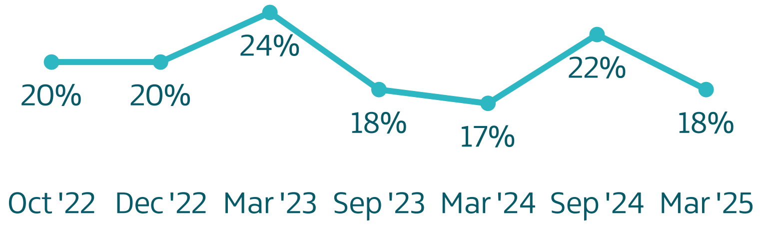
N = 156 (Pre), 85 (Young), 75 (Mid), 173 (Older), 113 (Empty)

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)?

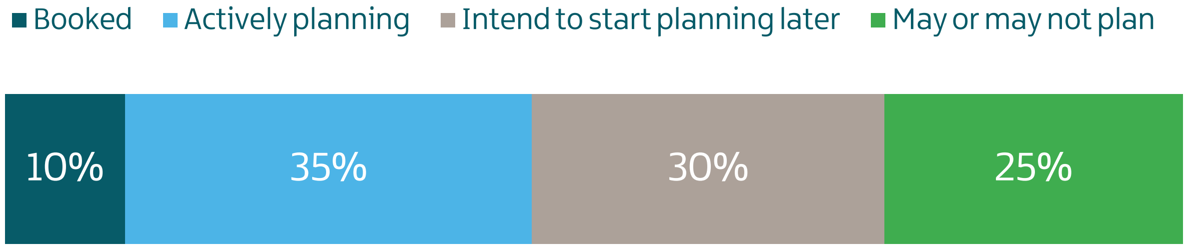
Short trip intentions stable vs. March '24, but down on September. 1 in 10 have already booked their trip

18%

are considering a short break in NI in Apr - June

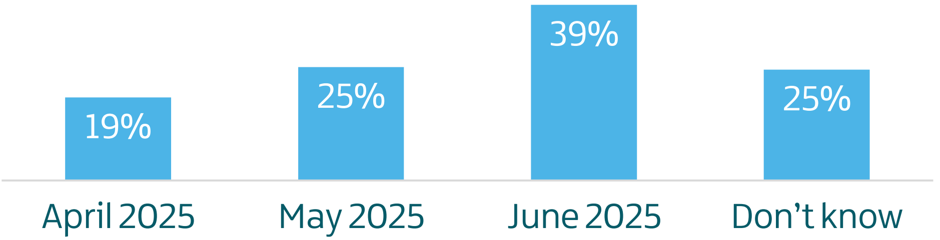


Status of short break – have they booked?



45% are actively planning or have booked a trip to NI – **8%** of the total sample

Short break planned for



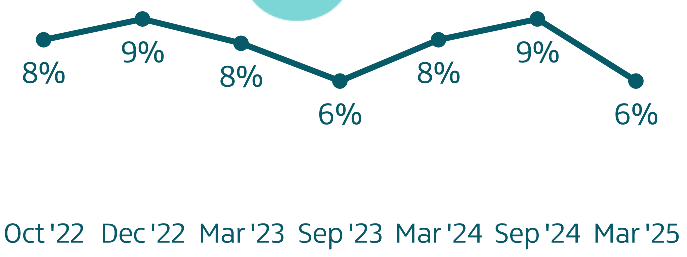
N = 750 / 136 considering short break

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?

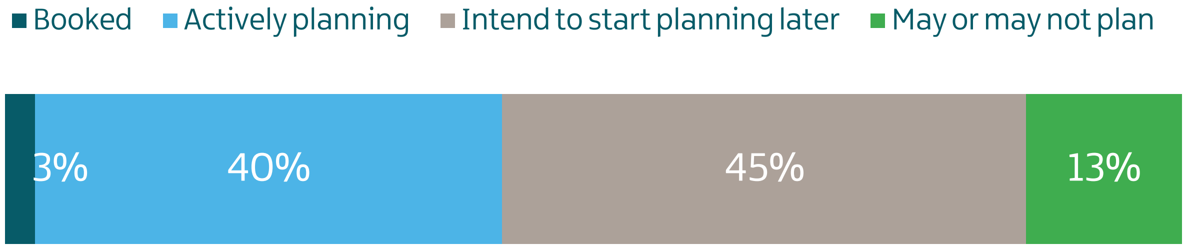
Only 6% of total sample considering long breaks in NI in spring – slight drop from March 2024

6%

are considering a long break in NI in Apr - June

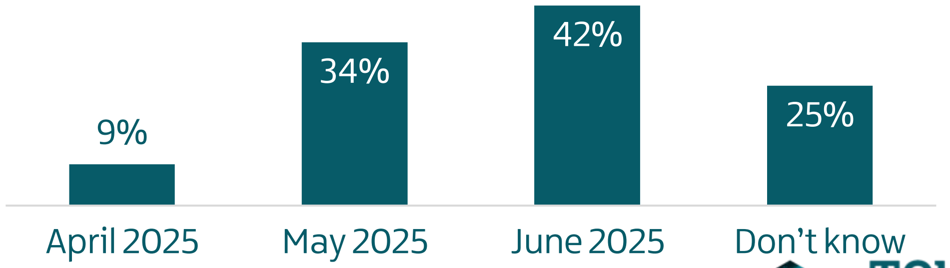


Status of long break – have they booked?



43% are actively planning or have booked a trip to NI – **3%** of the total sample

Long break planned for

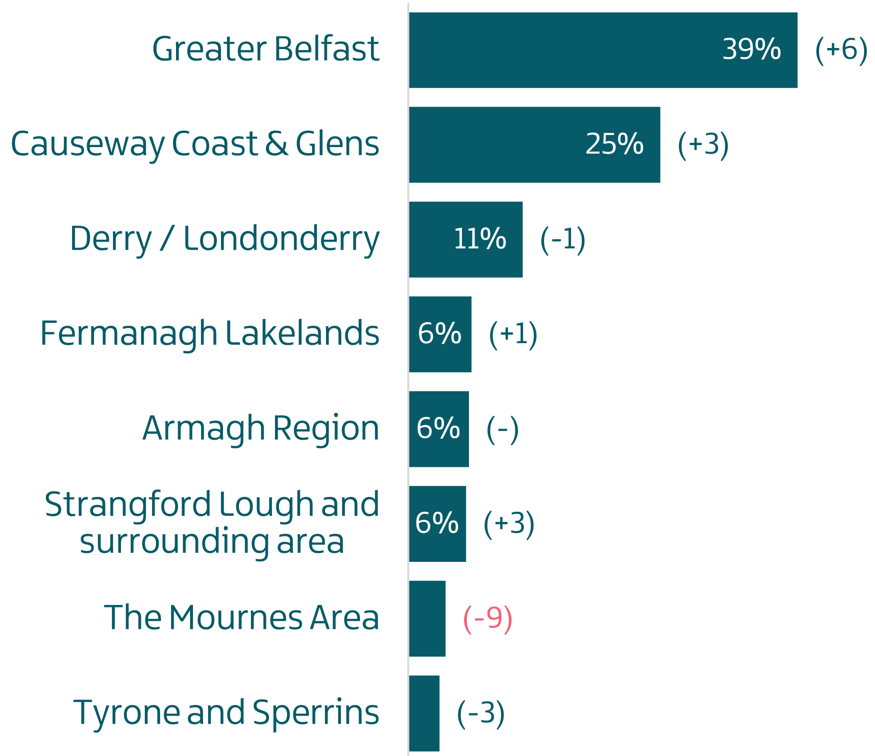


N = 750 / 45 considering long break

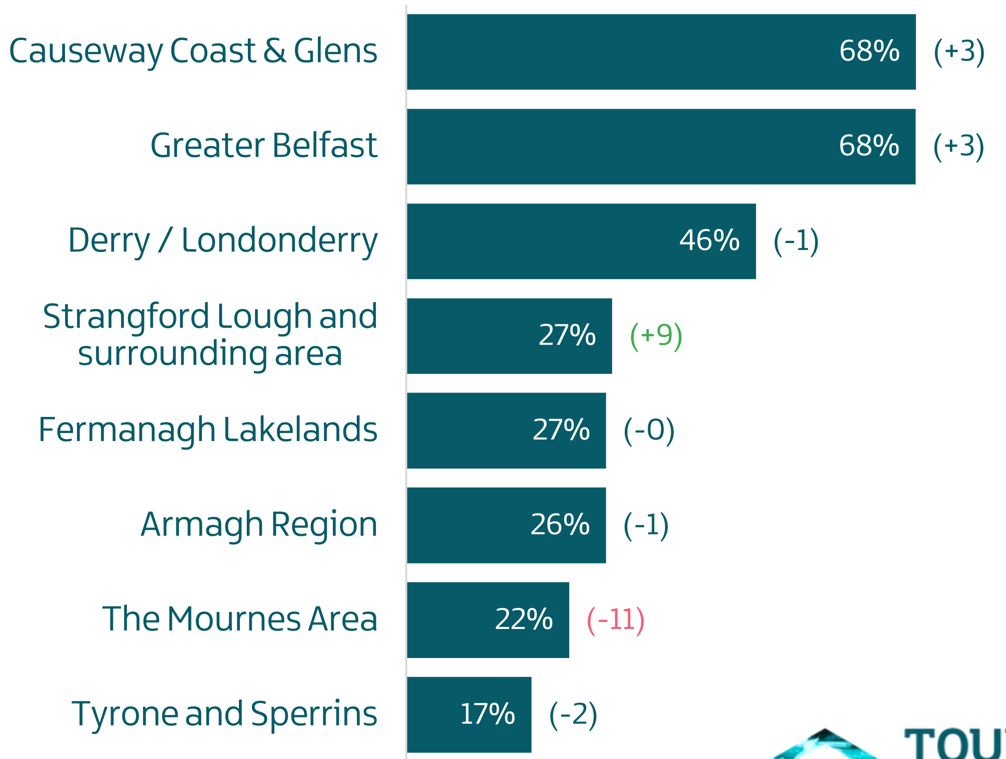
E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March to June)/ E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland/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

Belfast and Causeway Coast still broadest appeal but Belfast most likely to be no. 1 in ranking

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 = 139 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?

Repeat visits are driven by past enjoyment, recommendations, exploring more and seeing loved ones

What prompted people to take another trip (Chatbot)

Previous positive experience

We go back every year. We love going there!

See another area in Northern Ireland - I was there a year ago and I had fun

I really enjoyed my last trip there. Belfast is a beautiful city with great food and bars to explore. Also the Titanic museum was great

Recent positive recommendation

I have heard many positive things about new places and attractions from my friends

A friend's story of a holiday she recently had to Belfast - sounded great

To see friends / family

Have a friend there who I haven't seen for a long time so would be nice to take a trip and visit him.

To visit family and keep in touch with them

We love it there and have many friends there

Good value for money

Cheaper than expected for lots of things like food

It's affordable, people are nice and plenty to do

Sightseeing, attractions and events

We are going to see a concert and to spend some time together away from the kids

I found an activity of an alpine roller coaster at Colin Glen and it seemed like a fun thing to make a trip out of with friends

It's a fantastic place to visit - Loads of family friendly activities

See more sights - I would like to visit some of the beautiful coastal areas

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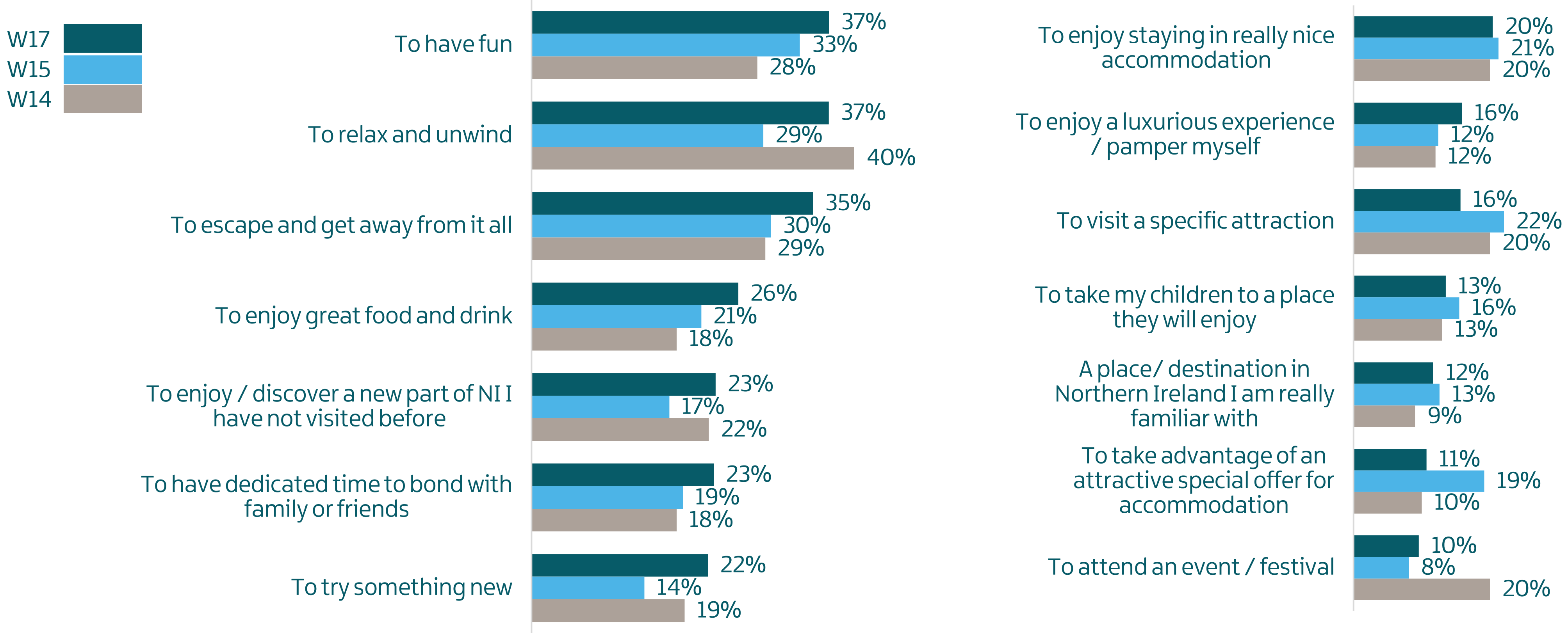
CB1. You mentioned you plan to take another trip in Northern Ireland in the next 6 months. What has prompted you to take another trip in Northern Ireland?

Top 3 trip motivations are the same as previously; however, increases for relaxation / food and drink vs. W15

Trip motivations (long and short combined)

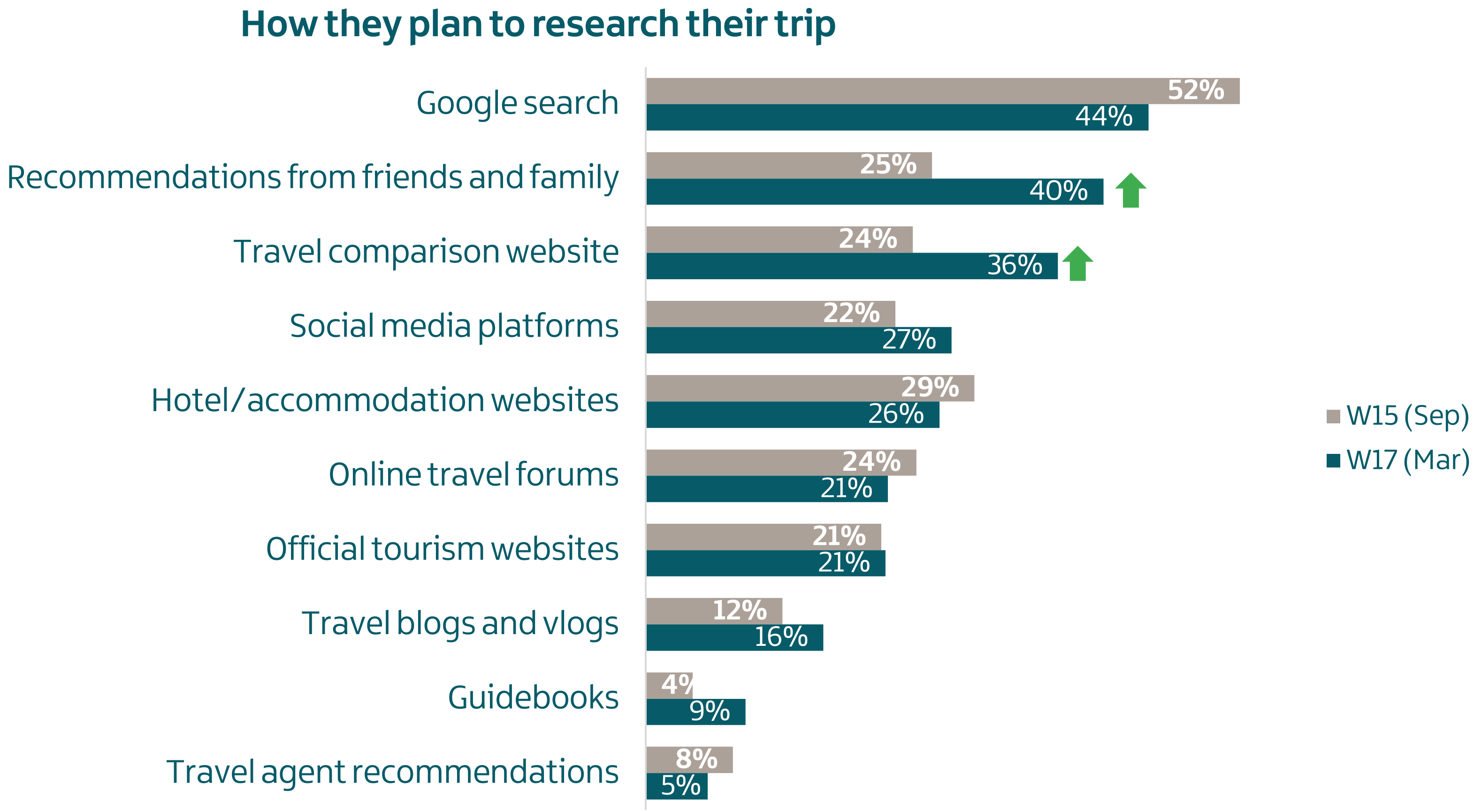


TOURISM NORTHERN IRELAND

N = 104 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?

A number of different research methods used more vs. Sept – in particular word of mouth and Booking.com



Booking.com is again the main choice of comparison site – 68% doing research via this site (down – 8pps vs. W15). 18% are doing research via Trivago

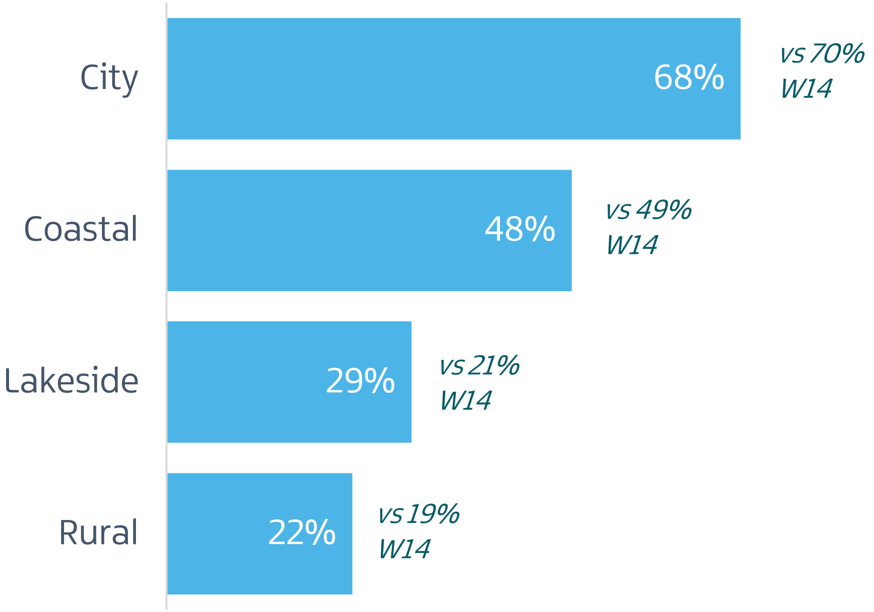
N = 104 planning long or short break (excl. "may or may not plan")

sig. higher / lower than prev. wave

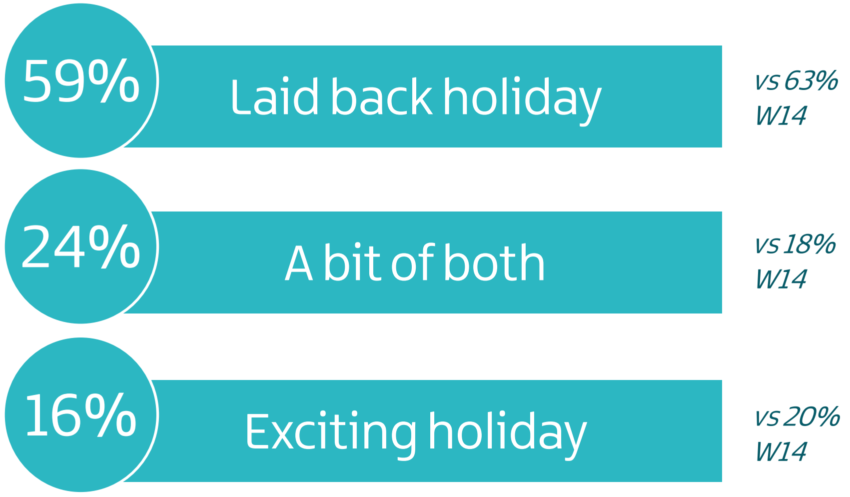
E10 And where do you plan to research accommodation, activities, travel, etc. for your upcoming trip in Northern Ireland? / E10b. You mentioned you plan to use a travel comparison website to research your upcoming trip in Northern Ireland. Which website do you plan to use?

Few changes in types of trip preferred – laid back & city breaks still top, although 'bit of both' increases

Type of break preferred



Type of trip preferred



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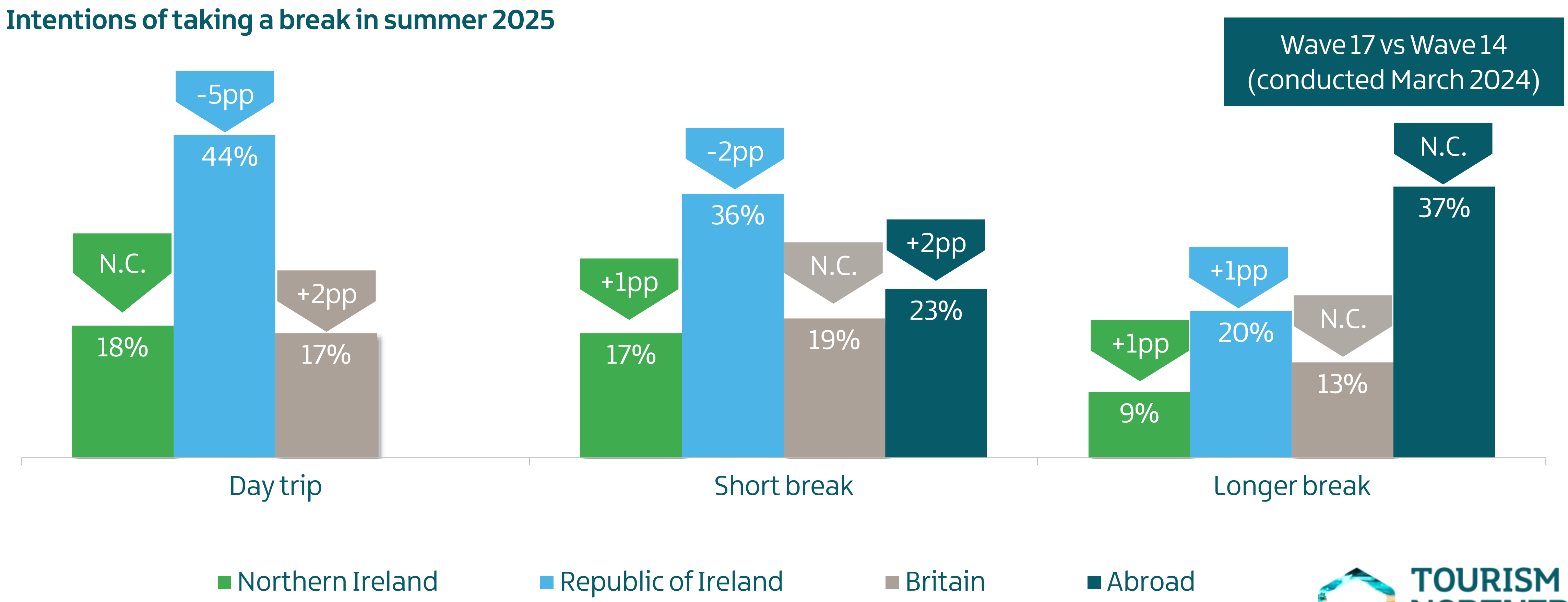
N = 104 planning long or short break (excl. "may or may not plan")

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?

Travel intentions for NI in summer are broadly stable vs. last year; declines in ROI day trips and short breaks

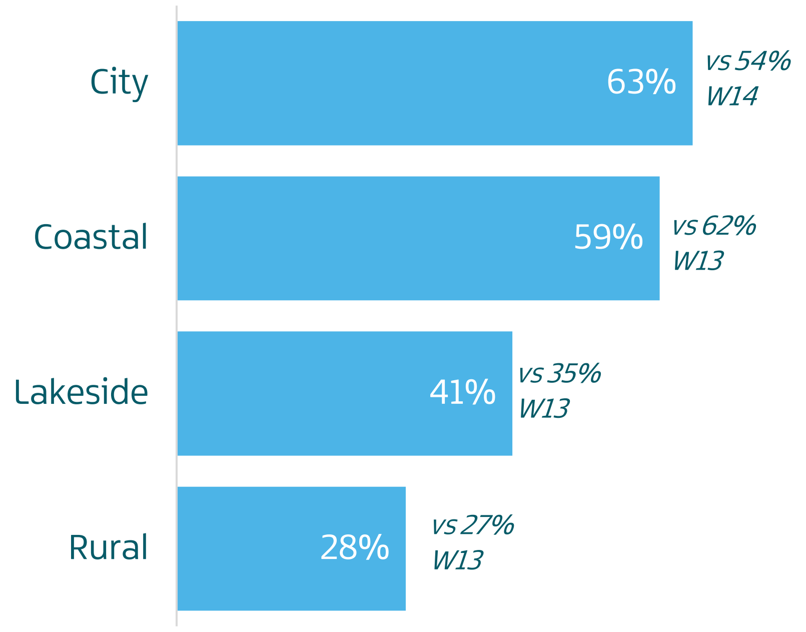


N = 750

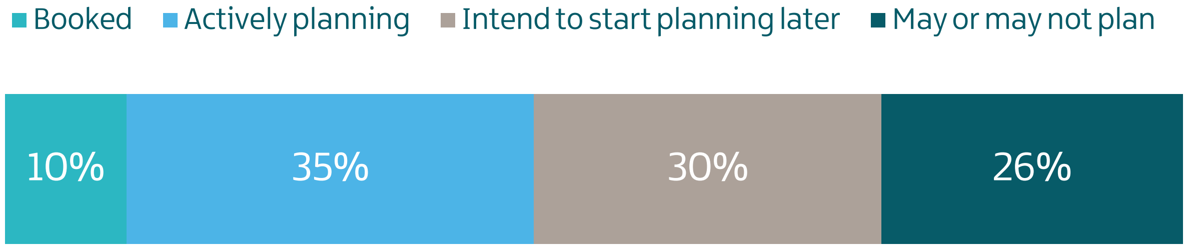
E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in summer 2025 (July to August)?

City break consideration is up for this summer vs. March 2024

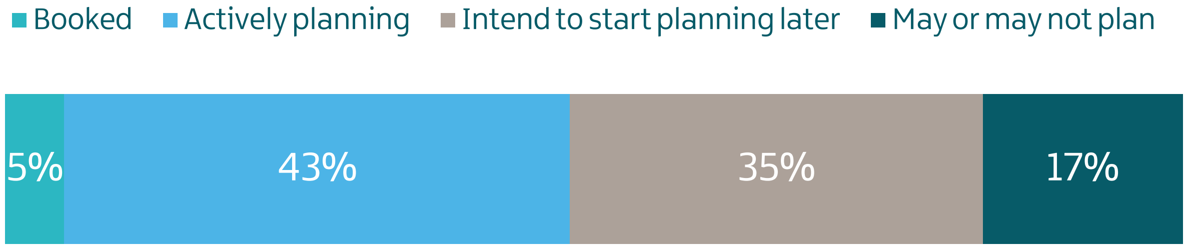
Type of break considered



Amount of short break planned



Amount of long break planned



N = 142 considering long or short break in summer 2025

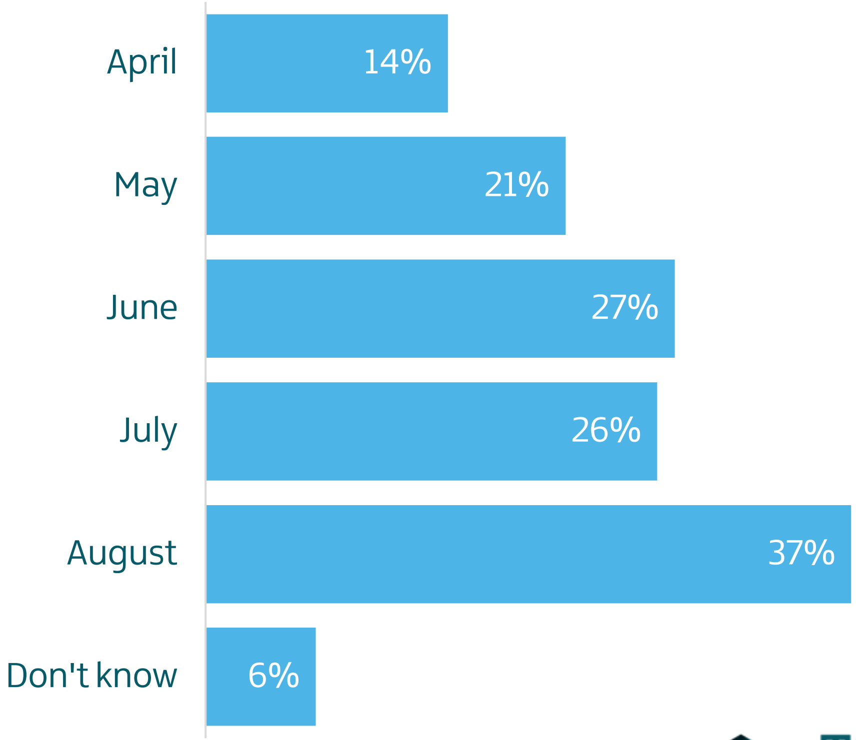
E24c. Which of the following destination types would you consider this summer (i.e. July to August)? E25 Thinking about the short/long trip(s) you said you would consider for in summer 2025 in Northern Ireland, have you booked or thought about planning this short/long trip?

Trip abroad intentions up vs March '24, although majority are planned for summer rather than spring

60% of total sample are considering a break abroad in the next 6 months
(⬆vs. 55% W14)

66% of this cohort are actively planning or have booked their trips
(vs. 65% W14)

When trips abroad are planned for



N = 452 considering a trip abroad

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)?

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⬆ sig. higher / lower
⬇ than prev. wave

Value for money

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Value for money net score stable vs. Sep 2024; ROI sees an improvement, but NI still 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	4%	67%	+63	+63	+67
Portugal	7%	63%	+56	+56	+53
Italy	17%	42%	+25	+25	+26
France	28%	29%	+1	+1	-1
Northern Ireland	32%	23%	-9	-10	-8
Great Britain	39%	18%	-21	-23	-26
Republic of Ireland	56%	19%	-37	-44	-42

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

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N = 750

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

Shopping and public transport in NI have the highest VFM net score. Value of meals out has increased since the last wave

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	19%	42%	+23%	+25%	+27%
Public Transport	14%	27%	+13%	+13%	+16%
Alcohol	28%	31%	+3%	+2%	+16%
Meals out	32%	36%	+4%	-3%	0%
Paid attractions	28%	23%	-5%	-4%	-3%
Petrol / Diesel	25%	19%	-6%	-7%	-7%
Accommodation	39%	33%	-6%	-14%	-8%
Paid Activities	24%	15%	-9%	-7%	-9%

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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?

Cost of living

Cost of living is still top barrier to travel, although decreases vs. September 2024

18-34s more likely to cite cost of activities (30%)

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N = 750

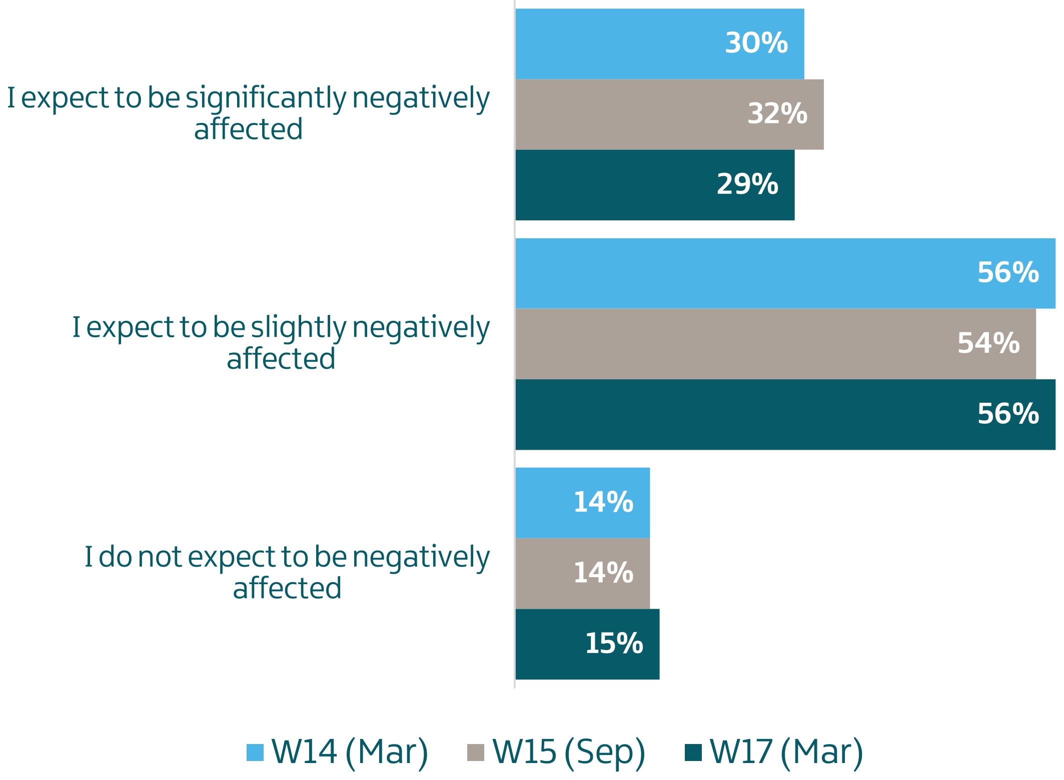
F0. Which, if any, of the following factors do you see as potential barriers to you taking a short break or holiday in Northern Ireland in the next six months?

sig. higher / lower than prev. wave

No change in overall number expected to be affected by cost of living, although there is a slight decrease vs. September

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 = 750

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

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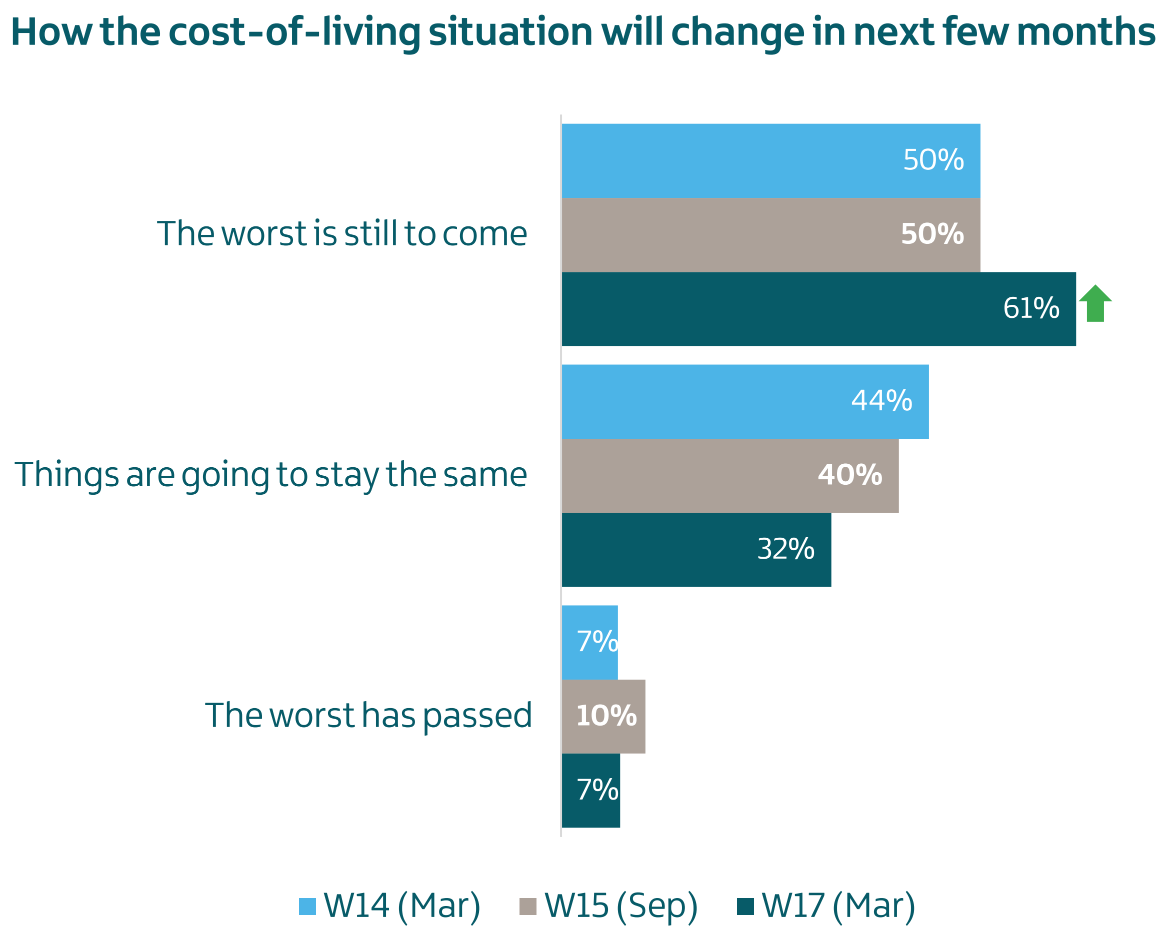
Significant increase in negativity however – the number saying the worst is still to come grows by 11 pps



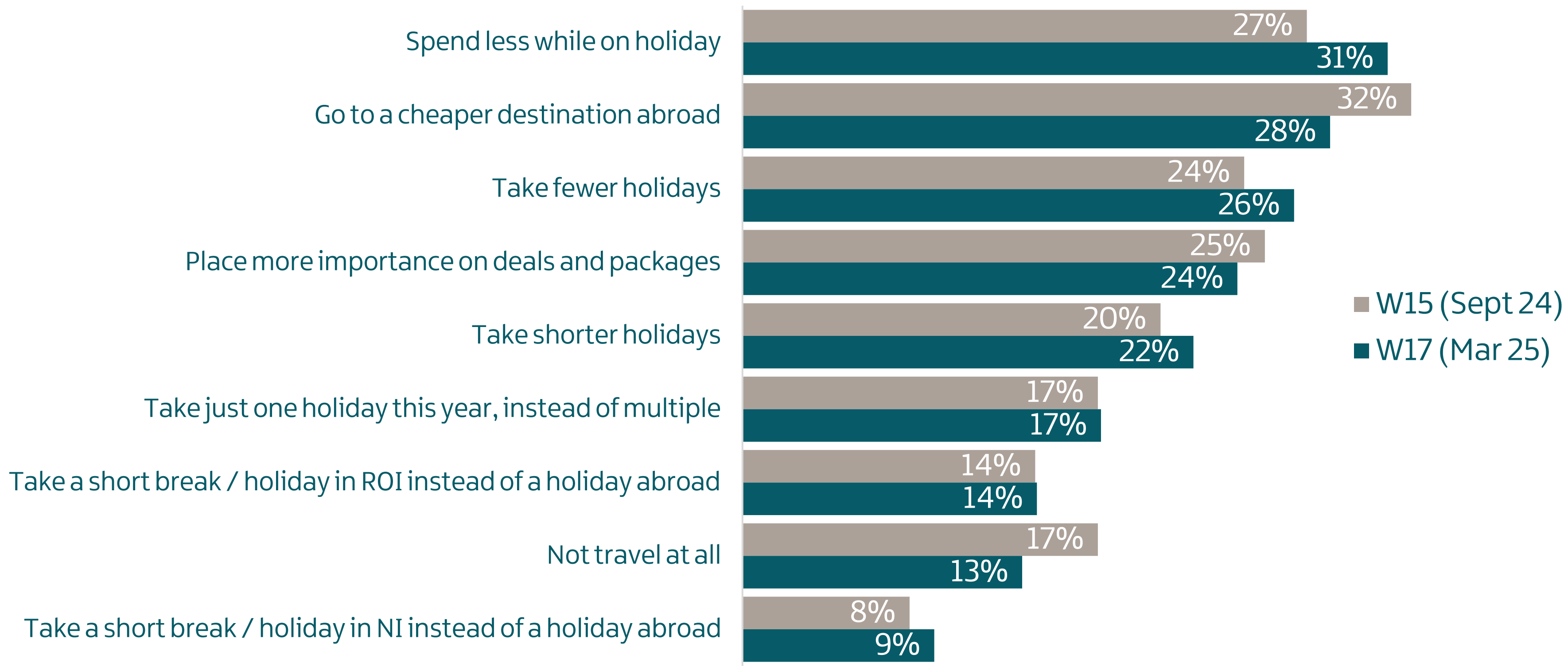
N = 750

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?

sig. higher / lower than prev. wave

Growth in number planning to spend less while on holiday vs. last year; slight increase in number looking to travel to NI too

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



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N = 750

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?

Few differences in terms of day trip impacts – most still looking for free things or to spend less in restaurants

N = 750

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?

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Summary

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Summary of findings (ROI Market)

Early 2025 performance

- Increase in number taking trips abroad this year vs. last year. Number of short breaks in NI is consistent with early 2024.
- Satisfaction with trips to NI remains high, with more ROI visitors saying their expectations were exceeded.
- Range of places to eat and drink, welcome & hospitality and the opportunity to enjoy the outdoors were all highly rated aspects of NI trip.

Travel intentions

- Intention to visit NI this spring and summer 2025 is steady, but ROI domestic travel plans have softened.
- More ROI consumers are considering longer trips abroad compared to last year.
- Motivations for a NI trip continue to centre around having fun, relaxation and escapism.

Value for money

- NI continues to be seen as offering better value than ROI or GB.
- For those who visited NI in 2025, satisfaction with the cost of accommodation and food & drink has improved.
- Shopping and public transport in NI have the highest VFM net score among ROI consumers. Value of meals out has increased since the last wave.

Cost of living and Outlook

- Most ROI consumers still expect to be affected by the cost of living, though fewer expect a significant impact compared to NI residents.
- Some consumers may avoid holidays altogether, but NI remains attractive, helped by its experiences and food and drink offering, as well as its perceived value.