Tourism Northern Ireland Consumer Sentiment Research

NI Market – Wave 21

Research conducted in September 2026

TOURISM NORTHERN IRELAND



Research background

TOURISM NORTHERN IRELAND



Research background

This is the 21st wave of our consumer sentiment research in the Northern Ireland (NI) market. We have continued to look at consumer attitudes towards travel in NI and elsewhere, monitoring changes throughout 2026 and intentions for the remainder of the year and early 2027.

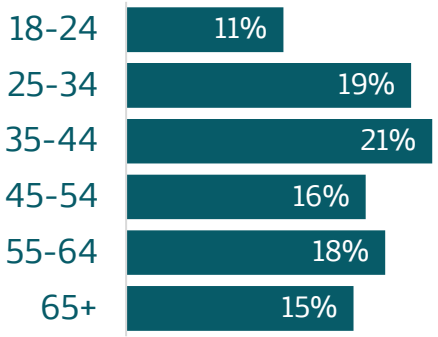
Objectives:

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

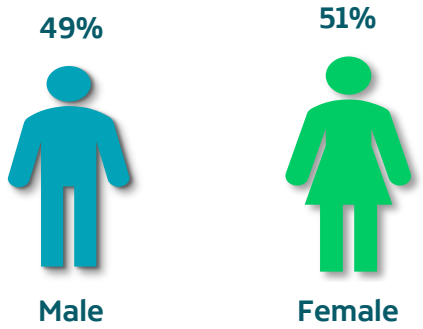
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We spoke to a robust, nationally representative sample in Northern Ireland

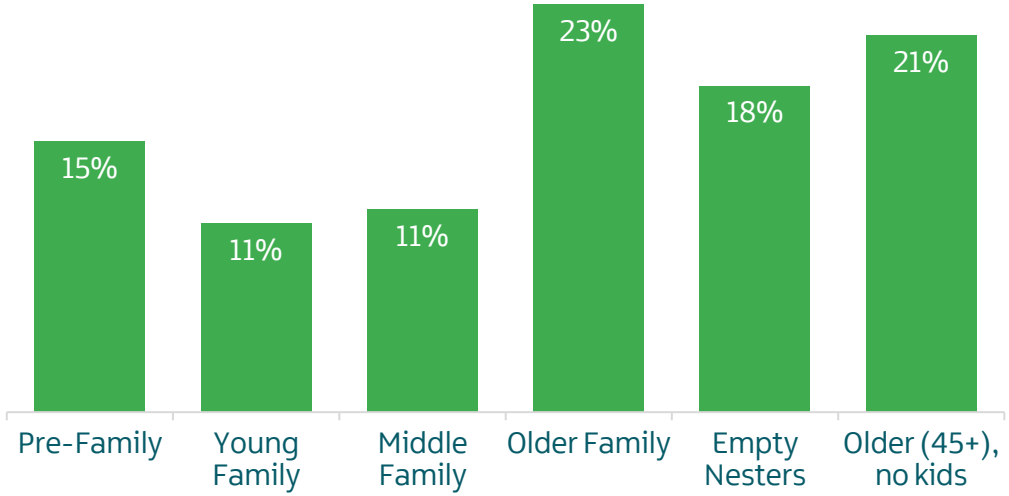
Age



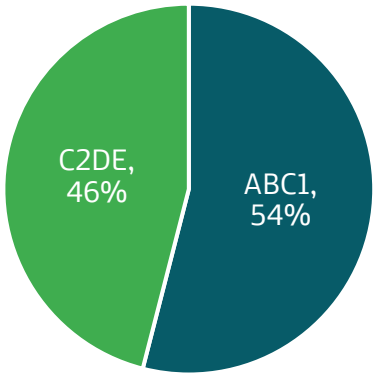
Gender



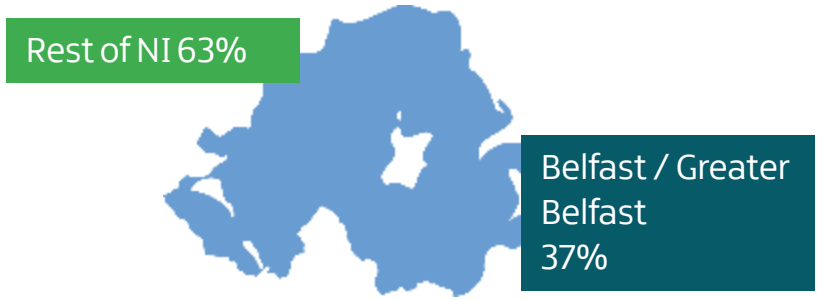
f



Socio



Region



TOURISM NORTHERN IRELAND

N=400. Fieldwork was conducted between 16th – 30th September 2026

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2 Travel intent

3 Value for money

4 Cost of living

5 Summary

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Travel experiences

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Domestic trips are stable year-on-year, with 1 in 3 taking an overnight break during 2026

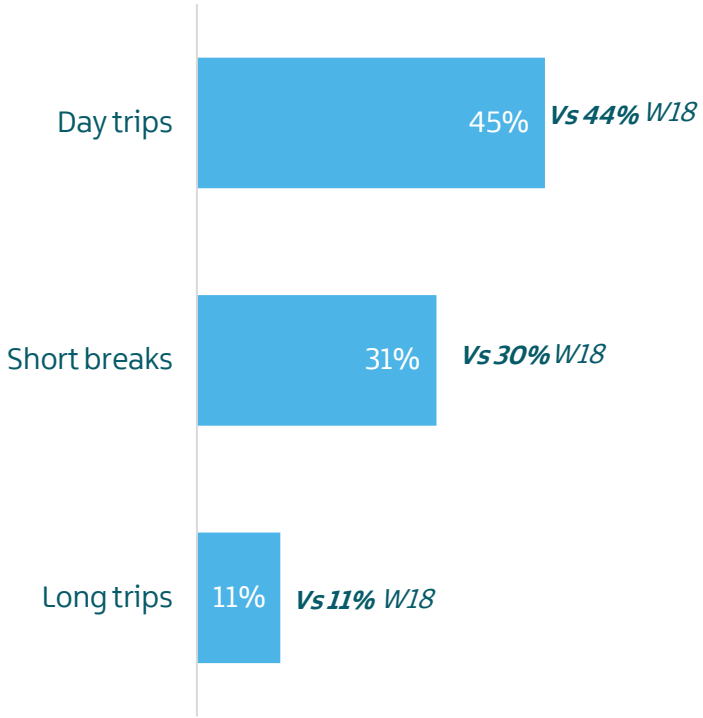
33%

Vs 33% W18

have taken a **short or long break in** NI in 2026

Wave 18 took place in Sept 2025

% of total sample who took a trip in NI



Other than NI...

31% took a break in ROI
Vs 31% W18

45% went abroad
Vs 40% W18

26% didn't travel at all
Vs 30% W18

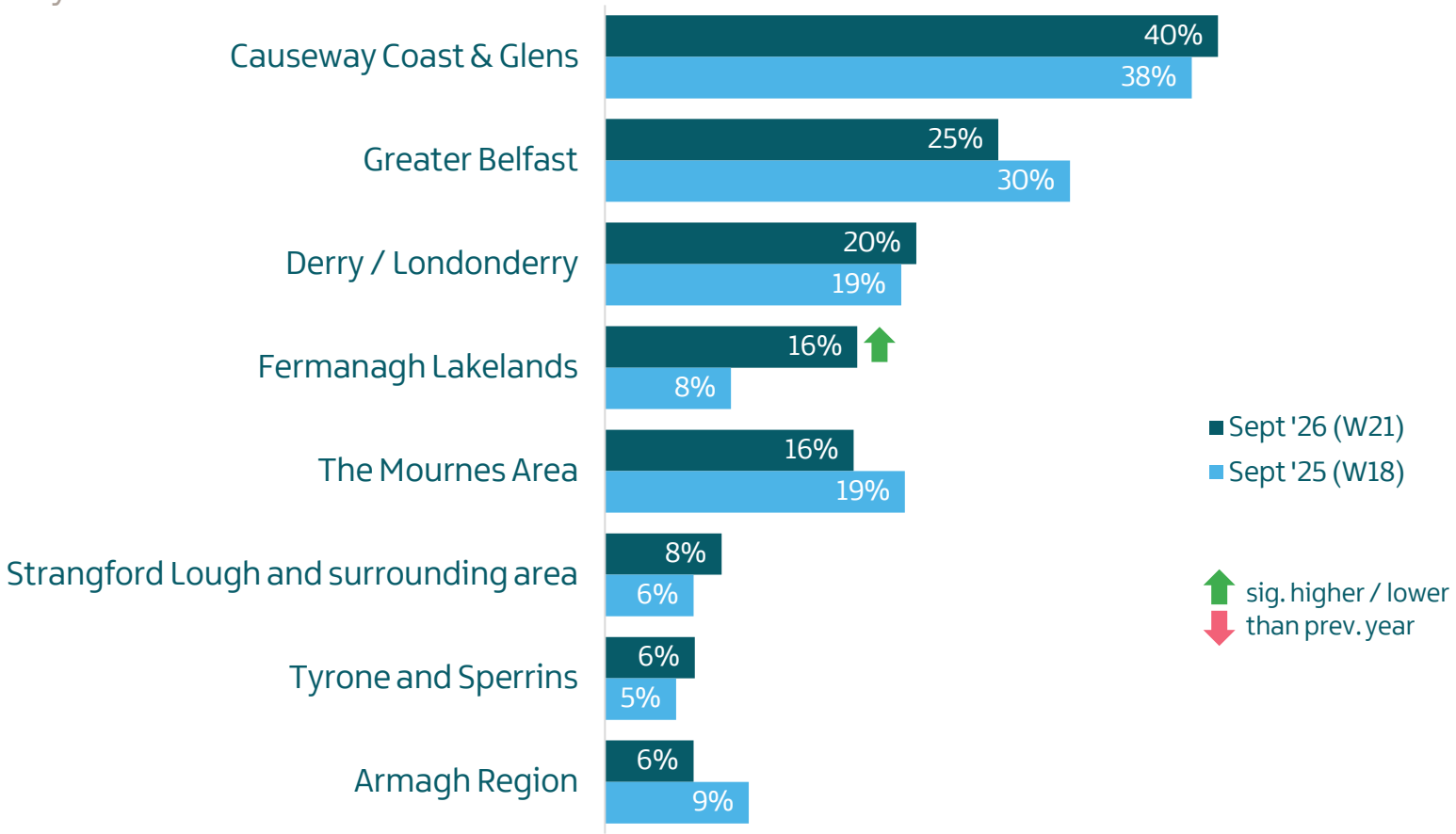
N = 400

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

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The Causeway Coast is the most visited region, while trips to Fermanagh Lakelands have increased

Where they visited in NI in 2026



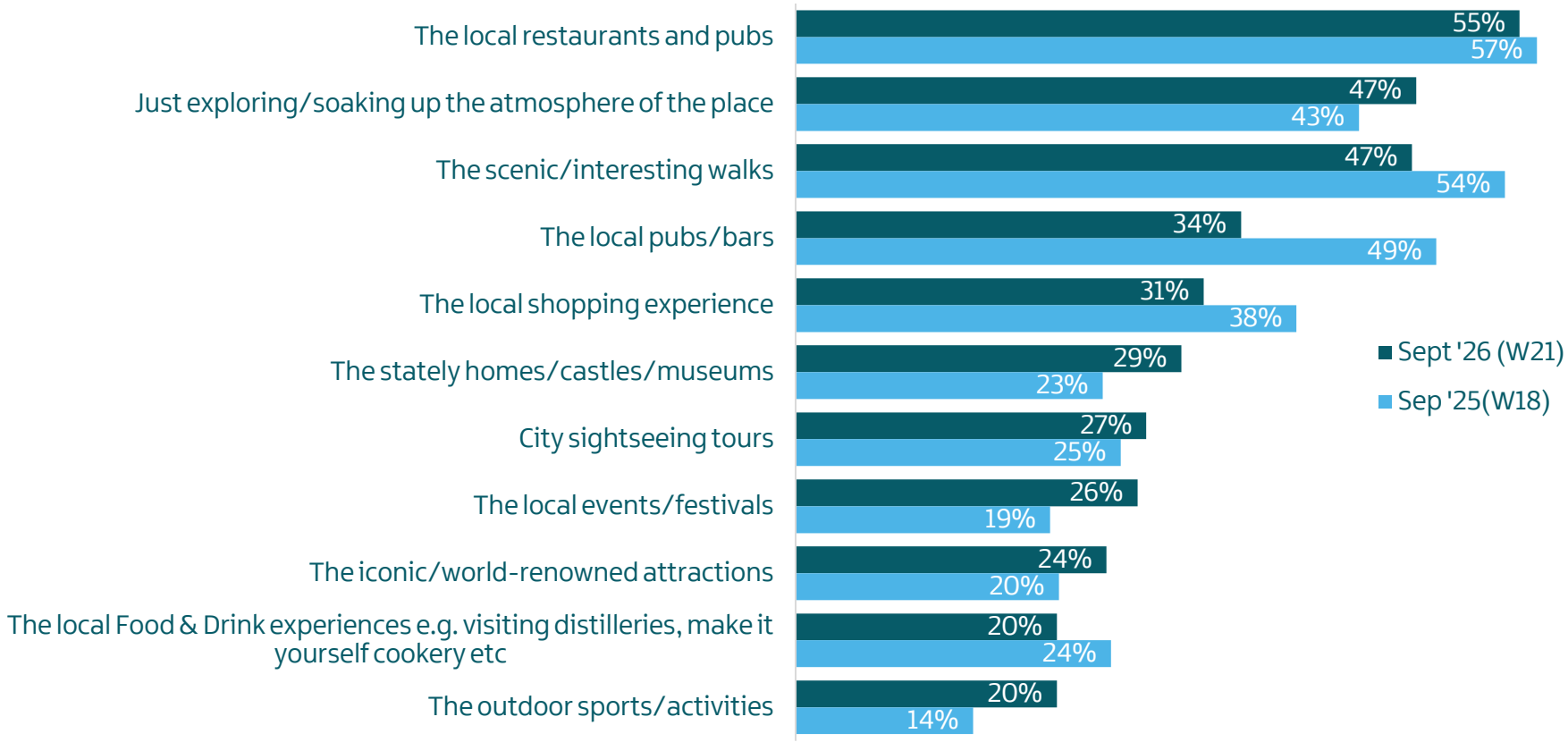
N = 204 took any break in NI in 2026 (inc. day trips)

D4B. Which of the following regions in Northern Ireland did you go to on your most recent trip?

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Local restaurants and pubs lead visitor experiences, with both local experiences and headline attractions proving popular

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



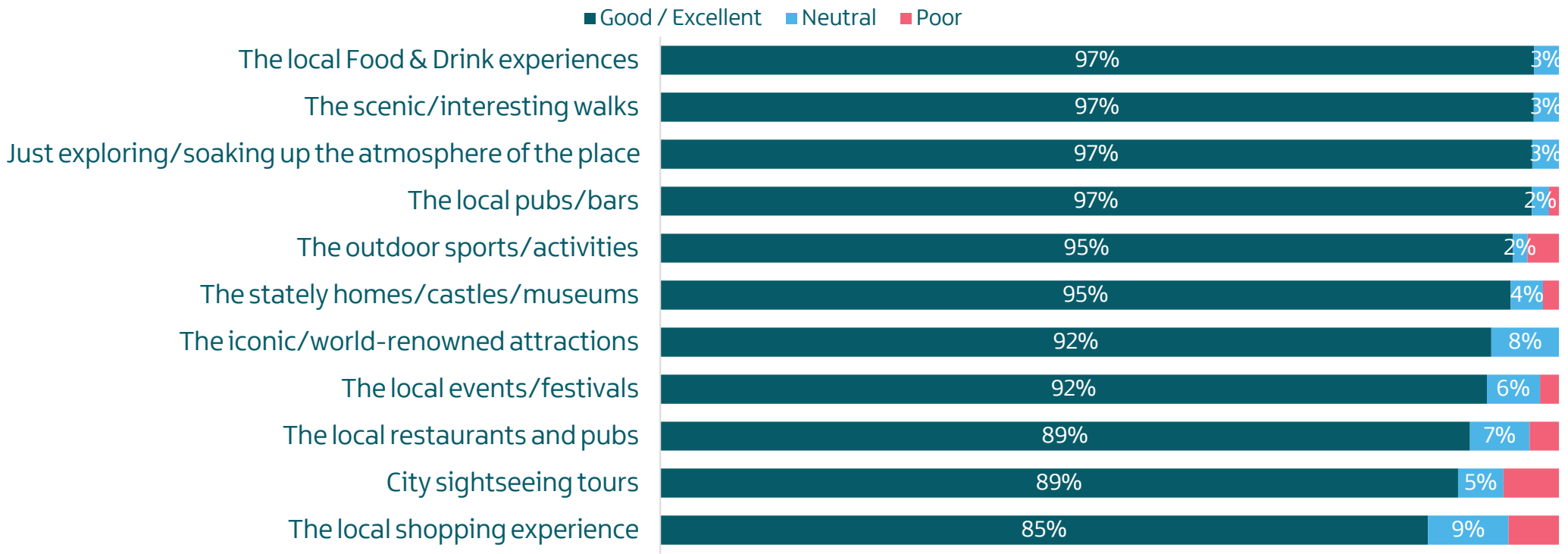
N = 133 took a short or long break in NI in 2026

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

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Visitor satisfaction is high across all activities, led by pubs, food and drink experiences and walks

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



N = between 39 and 105 (depends on which activities undertaken)

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

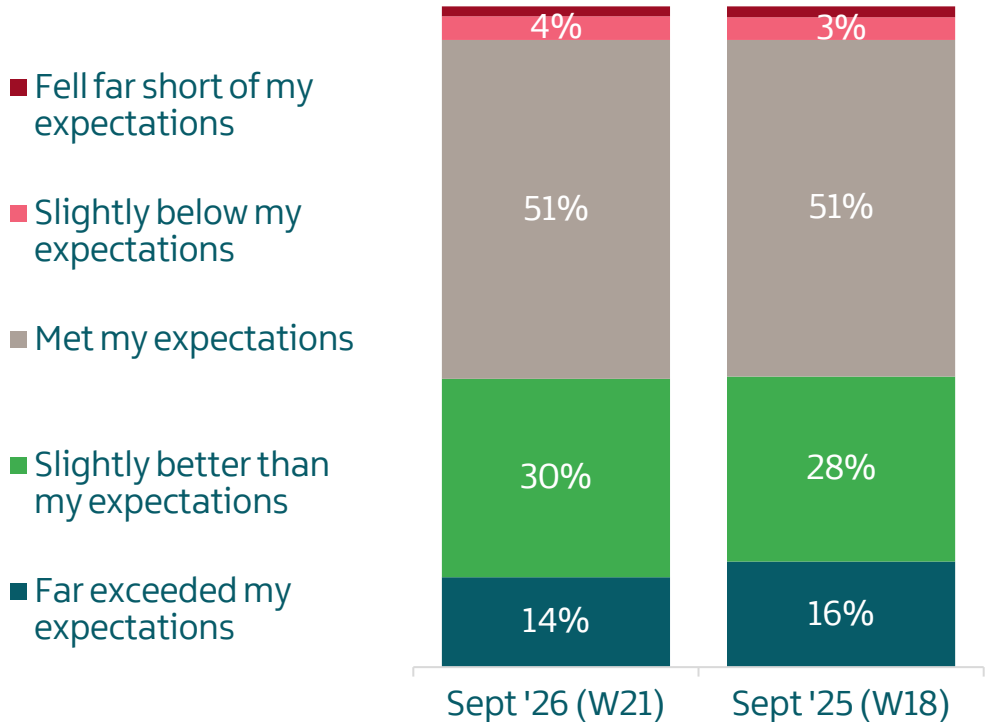
NI trips continue to deliver satisfaction, with 95% having expectations met or exceeded

95%

had their expectations met or exceeded

Vs 95%
Wave 18 (Sept '25)

Those who took a trip in NI felt their trip...



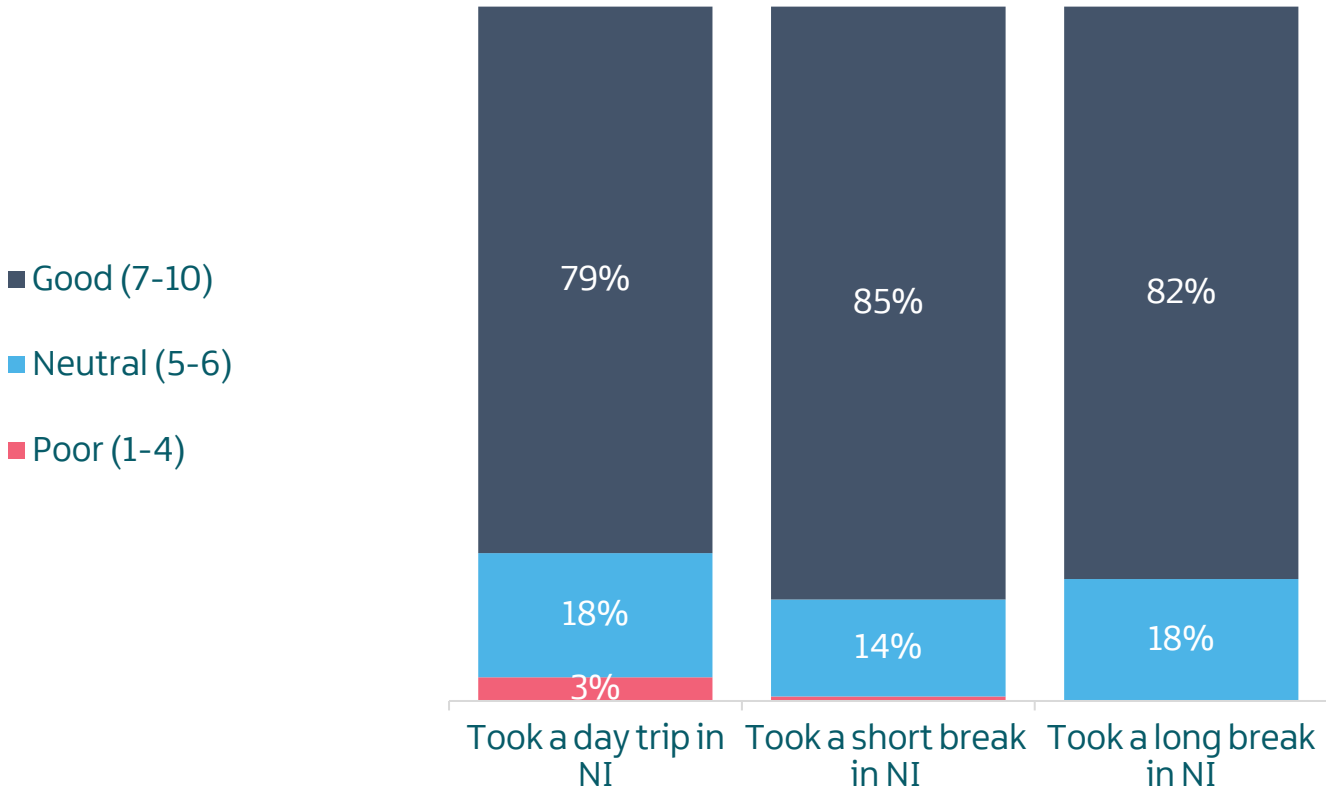
N = 133 took short or long trip in NI in 2026

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

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Trip ratings are strong across all types, led by short breaks

Trip ratings



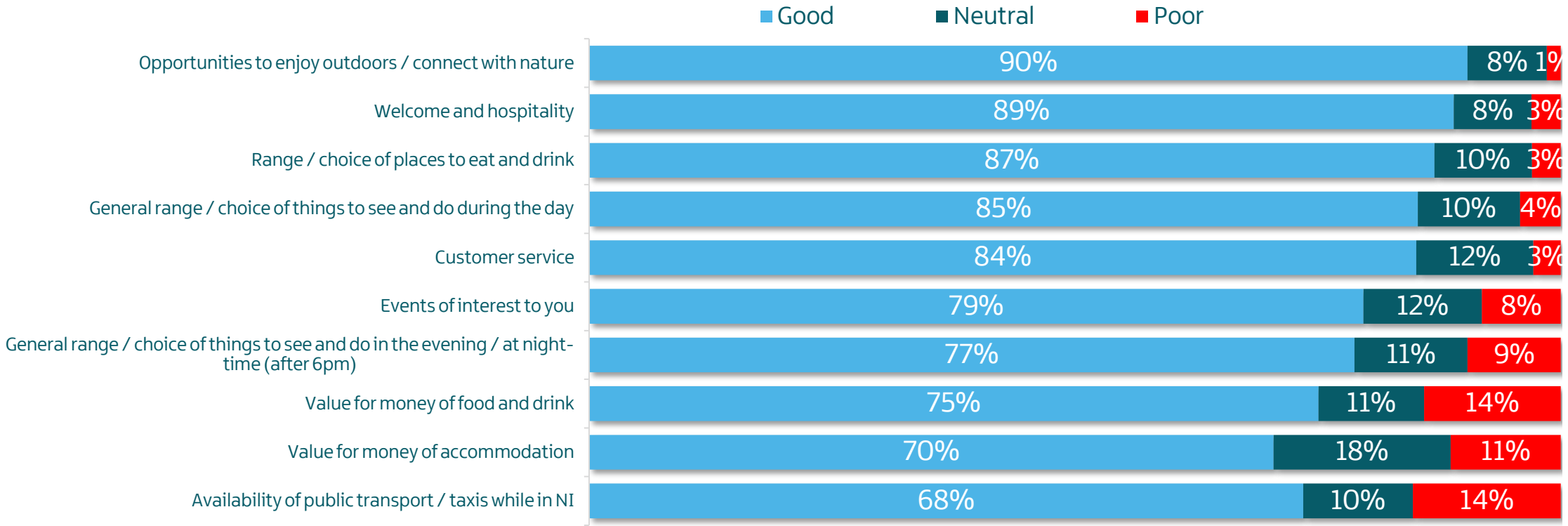
N = 179 took a day trip in NI, 123 took a short break & 43 took a long break

D5b. And how would you rate your experience on your most recent trip in NI on a scale from 0 to 10?

TOURISM NORTHERN IRELAND

NI delivers a consistently positive experience, led by opportunities to enjoy the outdoors and hospitality

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



N = 204 took any break in NI in 2026 (inc. day trips)

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

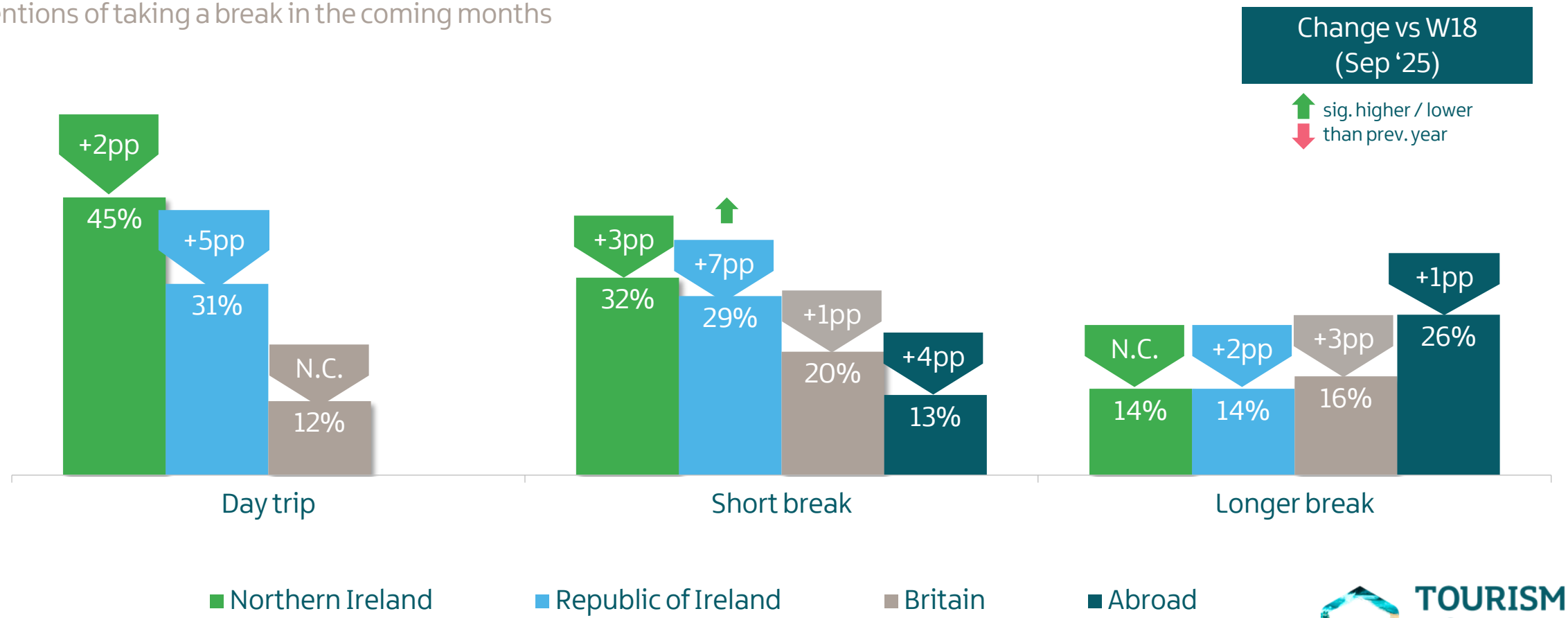


Travel intent

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While domestic short break demand has strengthened modestly, growth is more pronounced for ROI breaks

Intentions of taking a break in the coming months



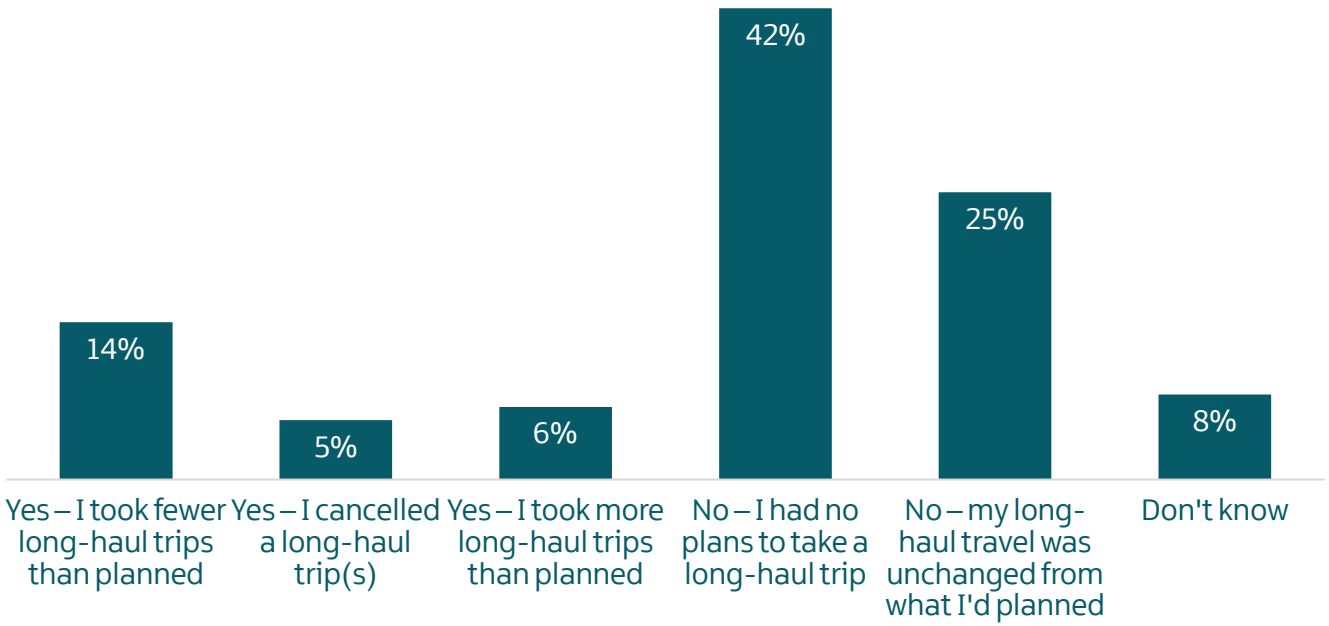
N = 400

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 September to December?

TOURISM NORTHERN IRELAND

1 in 5 have cut or cancelled long-haul plans, with over half of these taking a trip in NI instead

Plans regarding long-haul trips



Among those who cancelled – they visited the following instead

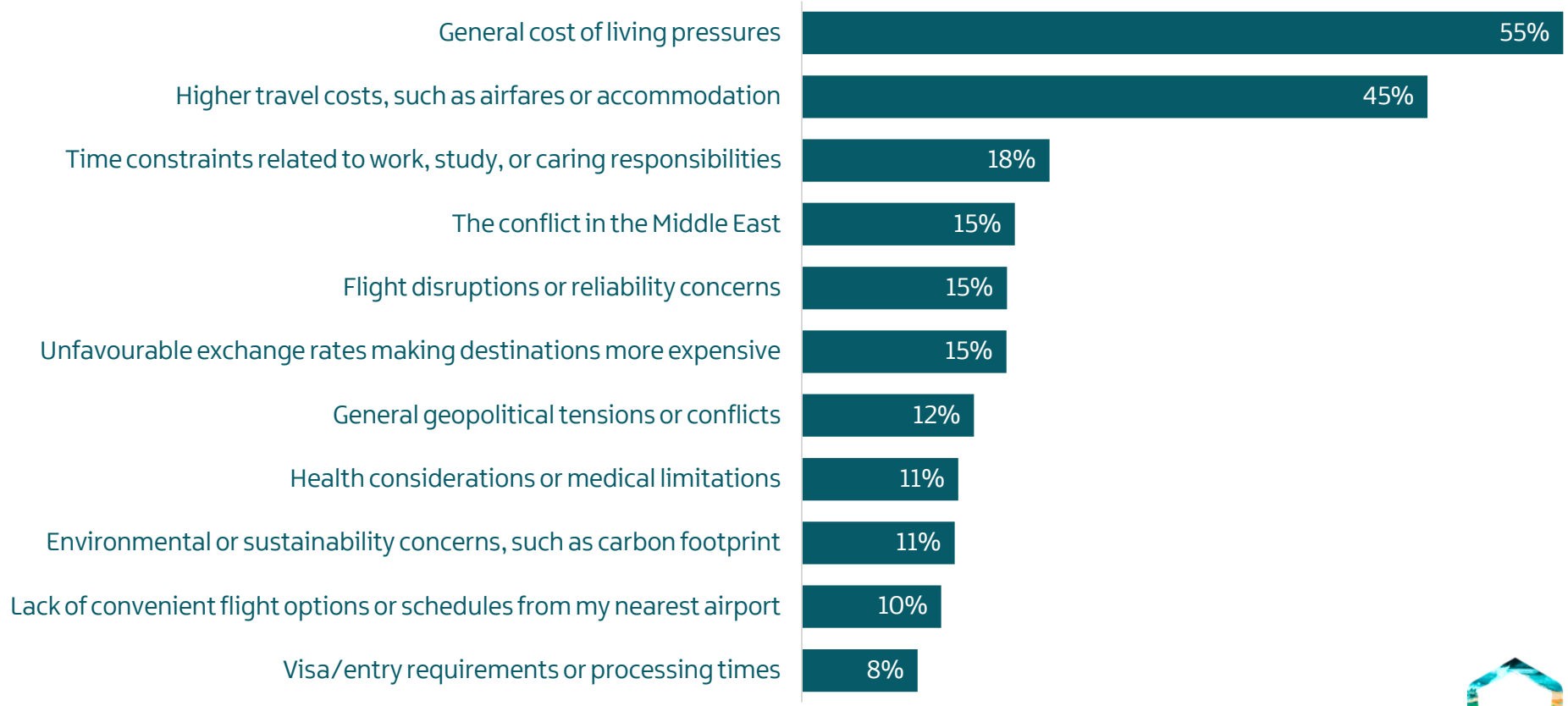
- 27% Republic of Ireland
- 55% Northern Ireland
- 10% Mainland Europe
- 23% Great Britain

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Q17b. And thinking specifically about summer 2026 (June to August), did your plans regarding taking long-haul trips (outside of the UK, Ireland, or Europe) change?
Q20. As you cancelled a long-haul trip or took fewer long-haul trips than planned, did you visit any of the following destinations instead?

Looking ahead, cost pressures are the main reasons for cancelling or reducing long-haul trips

Reasons for cancelling / being less likely to take a long-haul trip

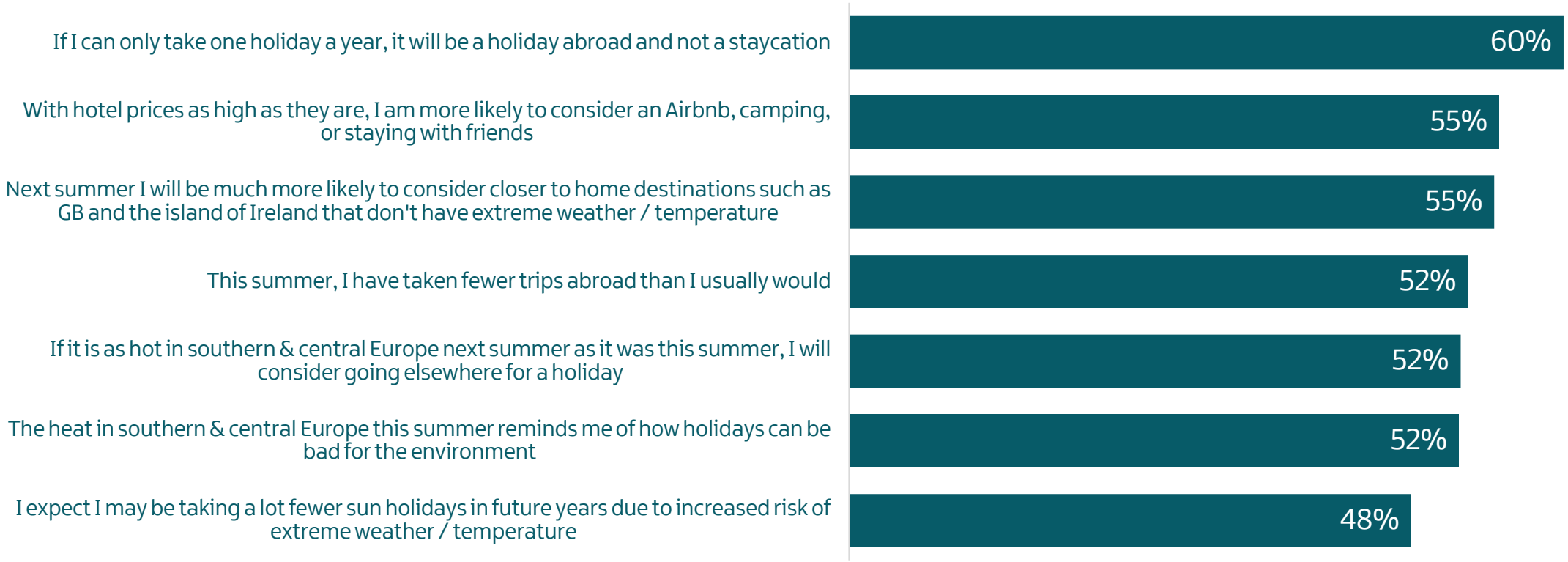


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Q18. What were the main reasons you cancelled a long-haul trip or took fewer long-haul trips than planned over the past 6 months?

Going abroad is still a priority, but heat and cost are pushing over half to consider holidays closer to home

Impact of cost and extreme weather on holiday choices - NET Agree

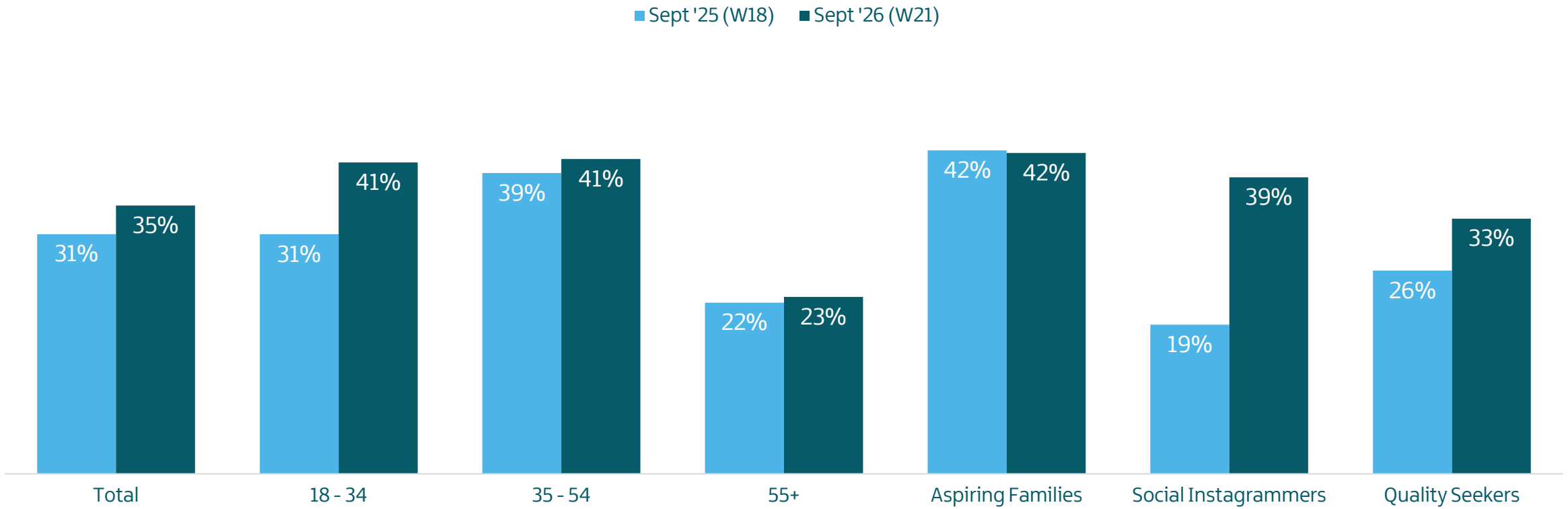


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L12. To what extent do you agree or disagree with the following statements?

Trip intention has remained broadly stable, with 18-54s the most likely to take a trip in the coming months

Intentions of taking a break in NI in the coming months – short and long trips combined



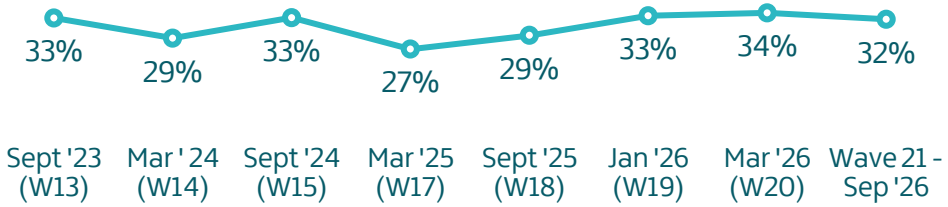
N = 400

E1b/c/d. Would you consider a 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 (September to December)?

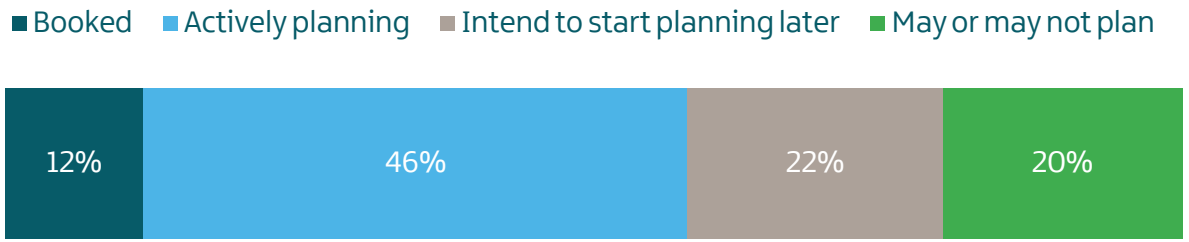
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6 in 10 of those considering a short break have booked or are actively planning, with November most popular

32%
are considering a short break in NI in Sep - Dec

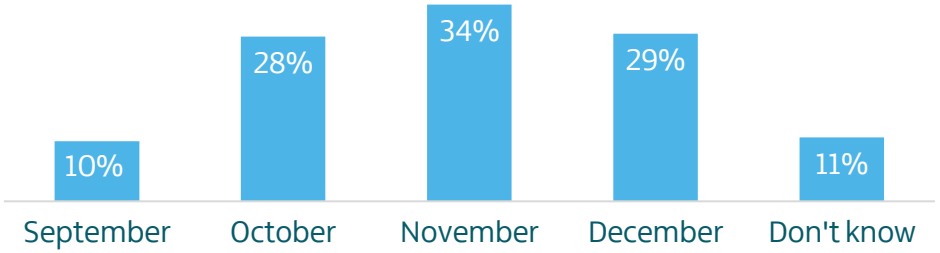


Status of short break – have they booked?



58% of those considering a short break are actively planning or have booked a trip in NI – **19%** of the total sample

Short break planned for



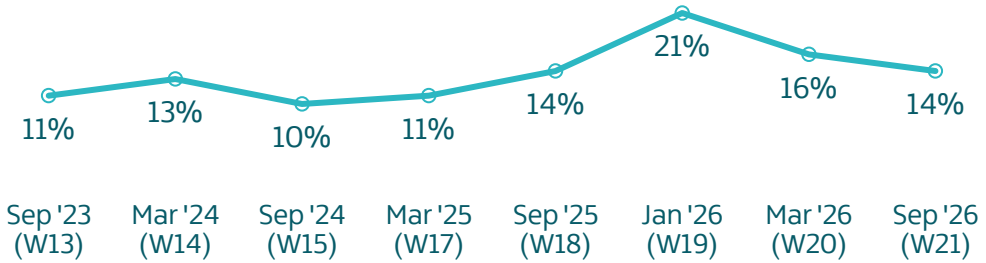
N = 400 / 130 considering short break

E1b. Would you consider taking a short break of 1-3 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?

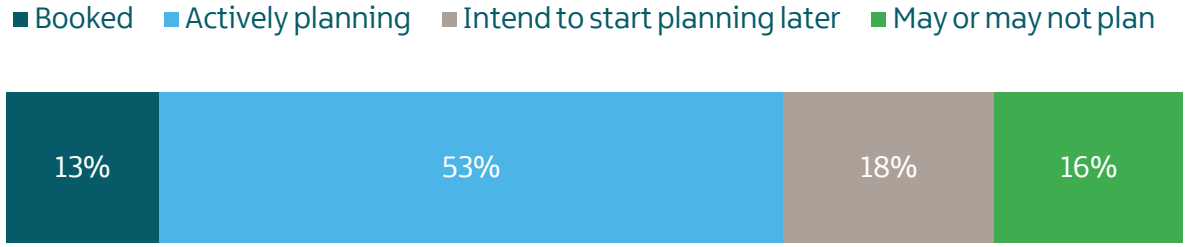
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Among those considering a long-break, 2 in 3 have already booked or are actively planning

14%
are considering a long break in NI in Sep - Dec

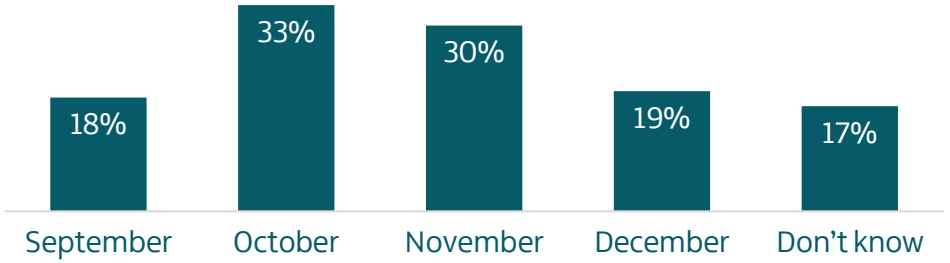


Status of long break – have they booked?



66% of those considering a long break are actively planning or have booked a trip in NI – **9%** of the total sample

Long break planned for



N = 400 / 55 considering long break

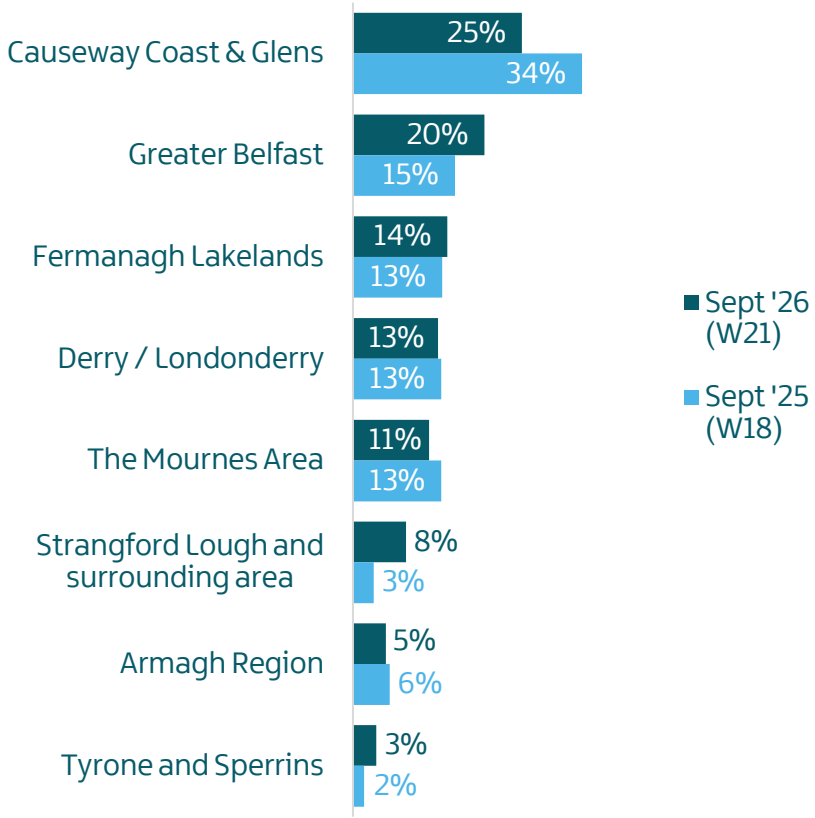
E1b. Would you consider taking a longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (Sep-Dec)? / E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland/ E3. Have you booked or thought about planning this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

TOURISM NORTHERN IRELAND

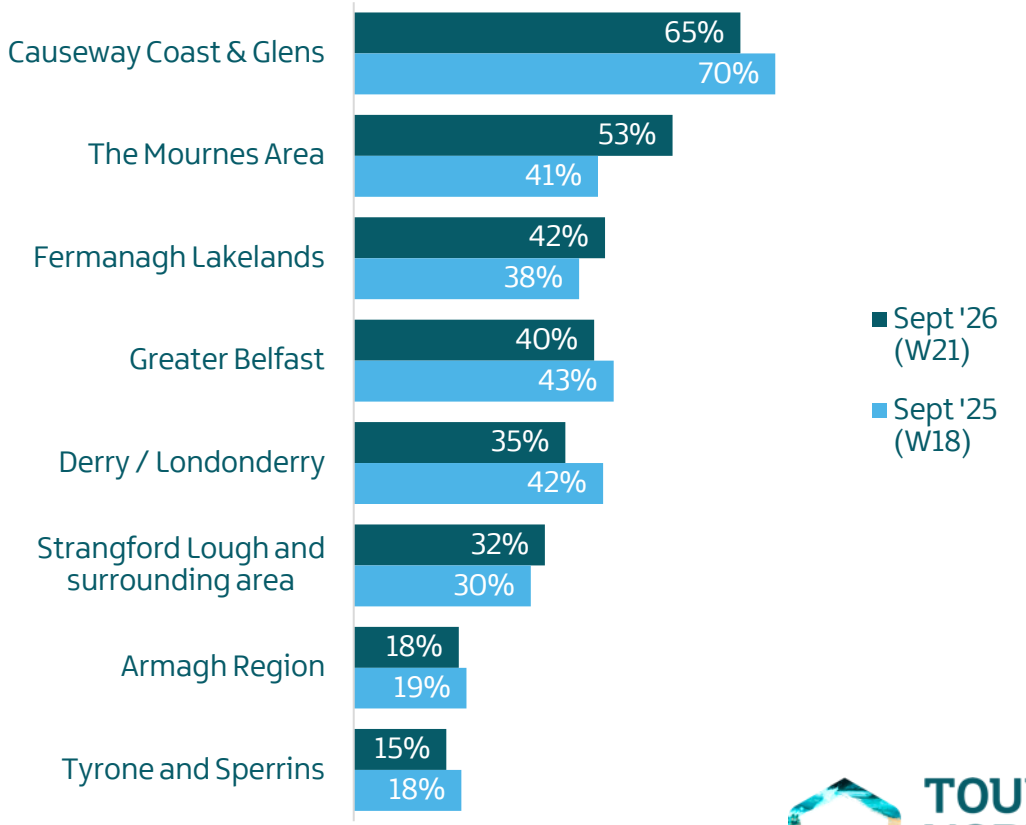
The Causeway Coast continues to be the preferred destination, although its lead has narrowed

Change vs W18 (Sep' 25)

Destinations selected as no. 1 consideration for next trip



Destinations in top 3 consideration for next trip



N = 140 considering a long or short break

E1f. And which of the following regions are you likely to consider visiting for your next trip in Northern Ireland?

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Relaxation remains the leading trip motivation, while escapism has increased as a driver

Trip motivations (long and short breaks combined) – top responses



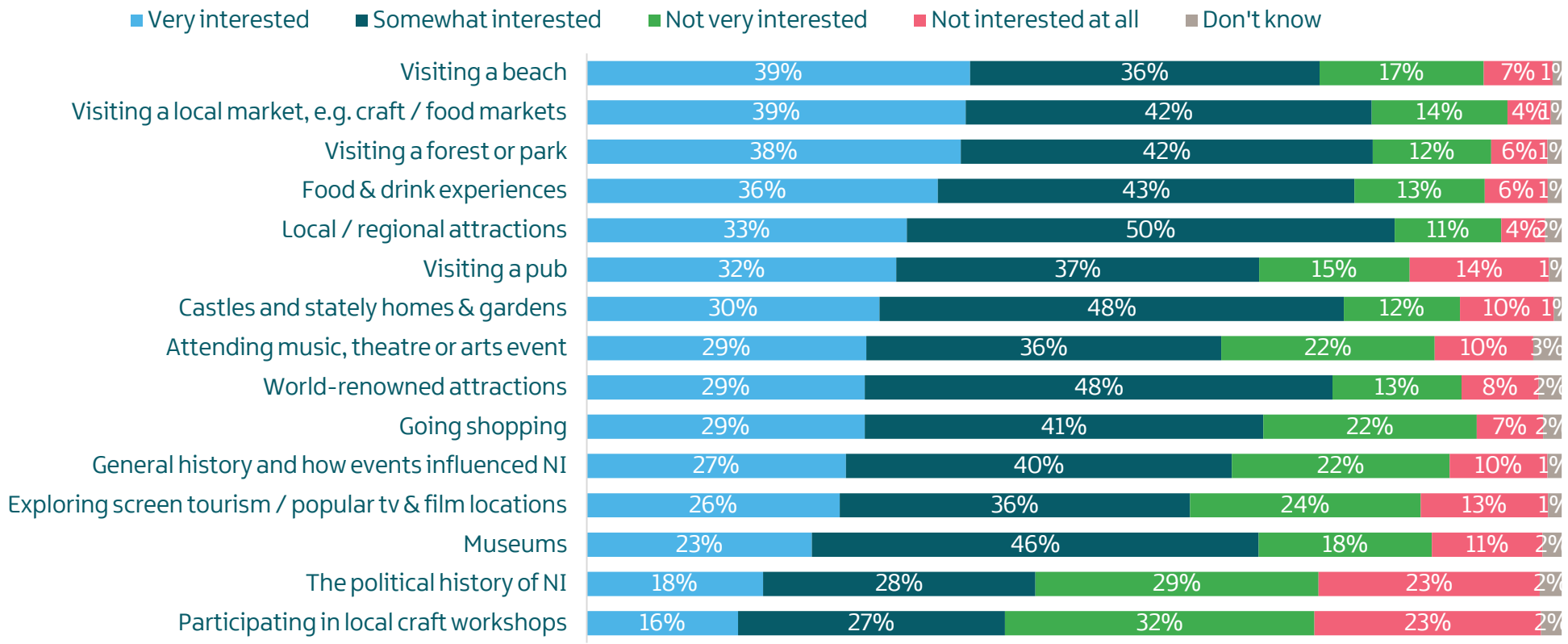
N = 140 considering a long or short break

E4a. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the trip?

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Beaches, local markets and forests/parks generate the greatest interest in future NI trips

Interest in NI experiences



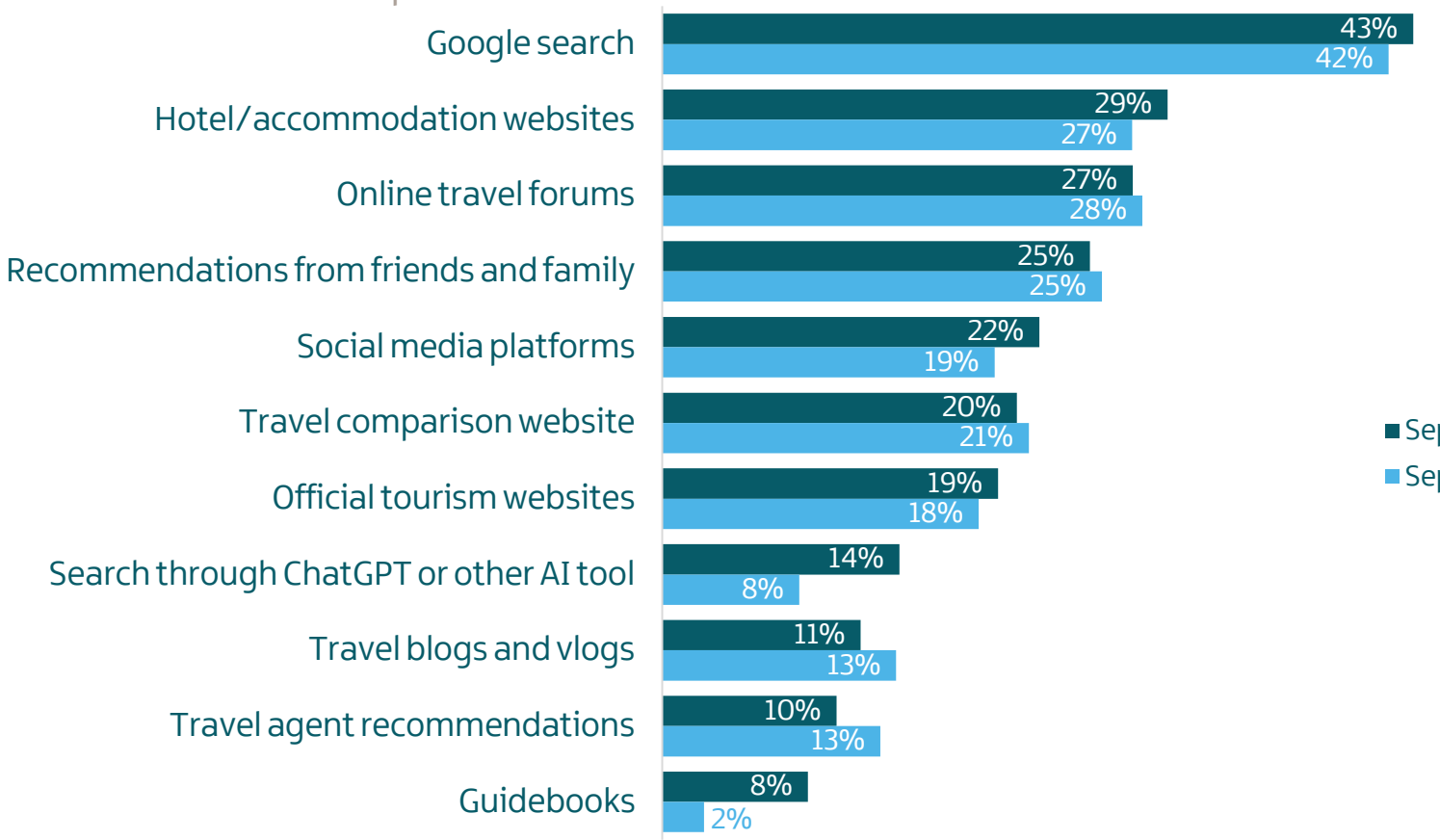
N = 400

N13. If on a short break/holiday in NI, which of these would you be most interested in visiting or finding out more about?

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Google remains the leading source for trip research, while AI search is rising

How people plan to research their trip



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

N = 140 considering a long or short break

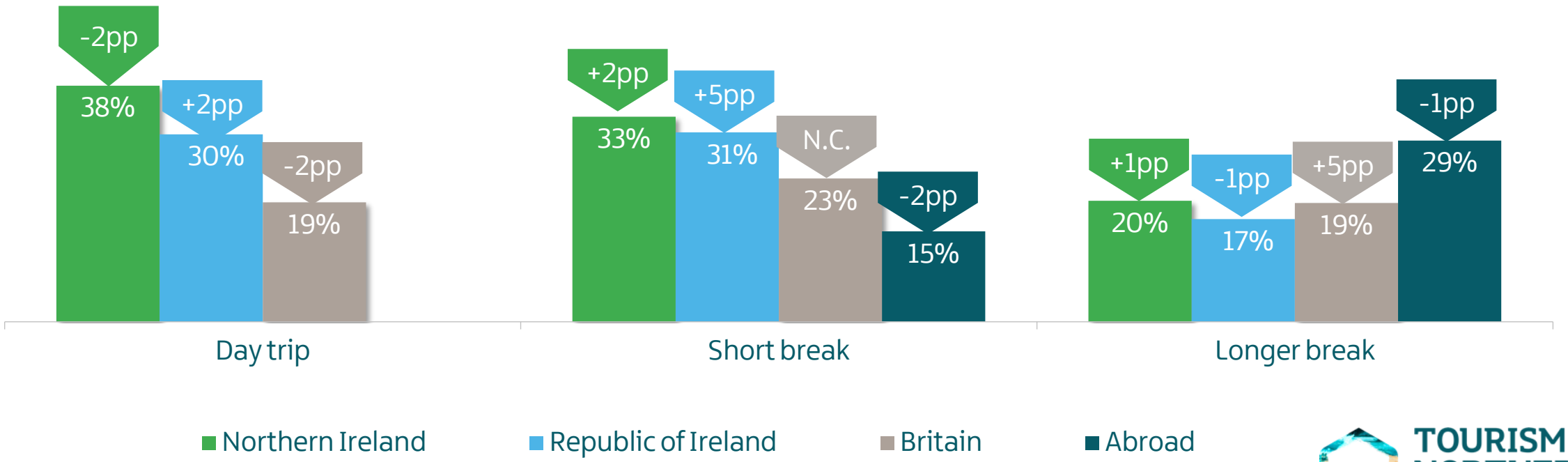
E10. And where do you plan to research accommodation, activities, travel, etc. for your upcoming trip in Northern Ireland? / E10b. You mentioned you plan to use a travel comparison website to research your upcoming trip in Northern Ireland. Which website do you plan to use?

TOURISM NORTHERN IRELAND

Intentions of taking a break in NI in winter/spring have remained stable, while demand for trips abroad has eased

Intentions of taking a break in winter/spring 2027

Wave 21 (Sep' 26) Vs Wave 18 (Sep' 25)



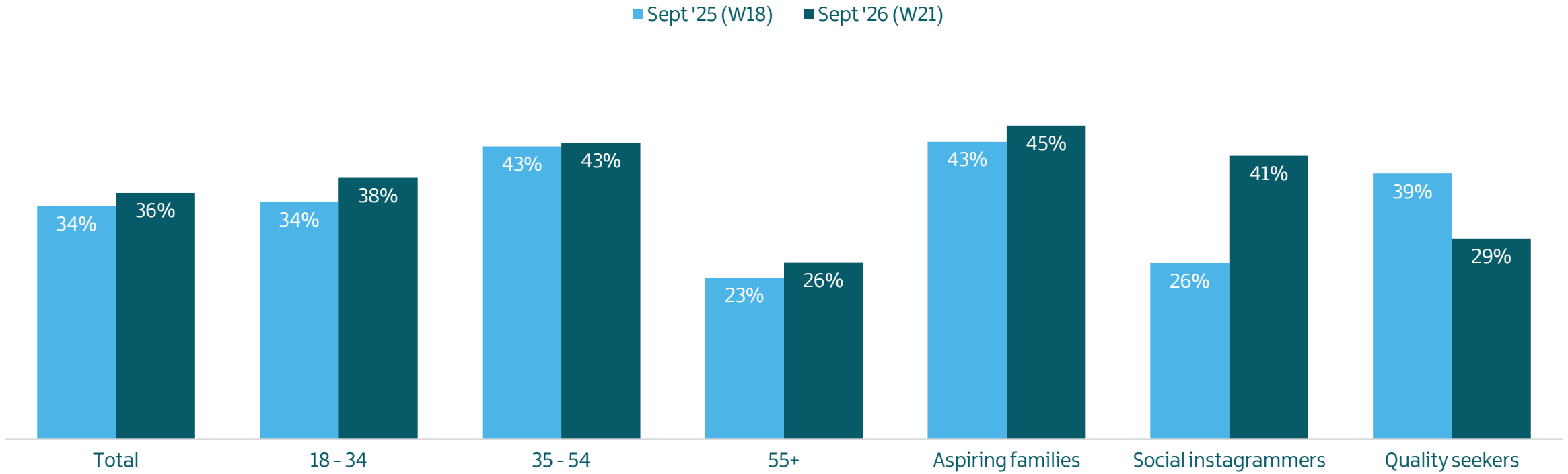
N = 400

E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in winter/spring 2027? 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 2027? 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 2027?

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Winter/spring overnight trip interest in NI is steady overall, with 35-54s showing the most inclination to visit

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

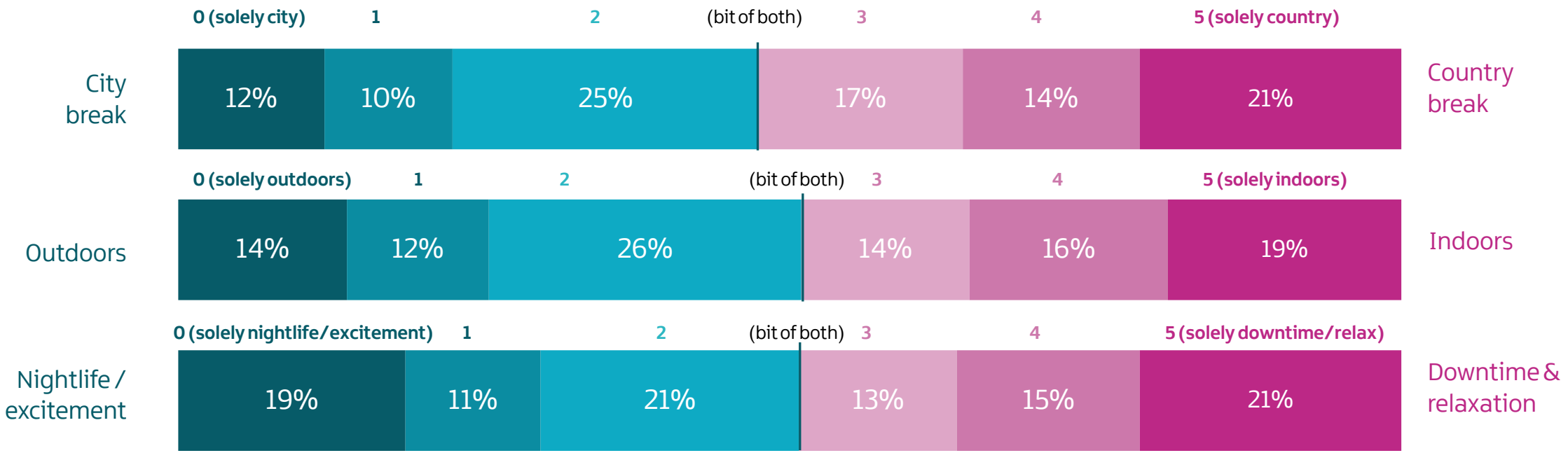


N = 400

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 (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 2027 (January to April)?

NI breaks have a wide appeal, attracting residents looking for a mix of experiences

Type of break considered in NI



N = 140 considering long or short break

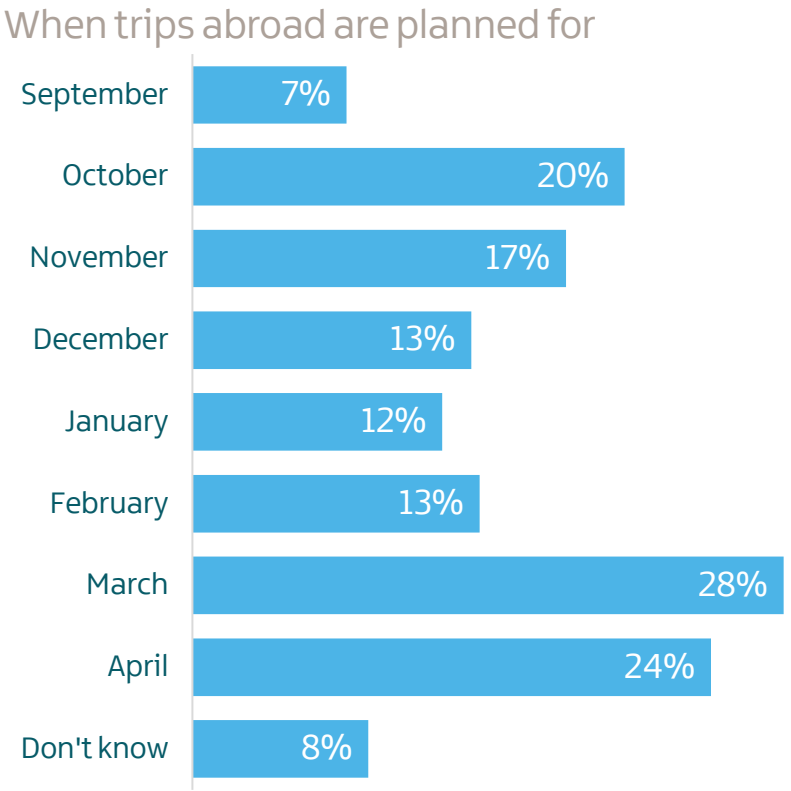
E13. If you were to consider taking a trip in Northern Ireland, what type of break would you imagine it to be?
E25. Thinking about the short/long trip(s) you said you would consider for in winter/spring 2027 in Northern Ireland, have you booked or thought about planning this short/long trip?

TOURISM NORTHERN IRELAND

People planning to travel abroad in the next 6 months are largely committed, with March 2027 the peak month

40% of total sample are considering a break abroad in the next 6 months
(Vs 40% W18)

68% of this cohort are actively planning or have booked their trips
(Vs 60% W18)



N = 162 considering 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?

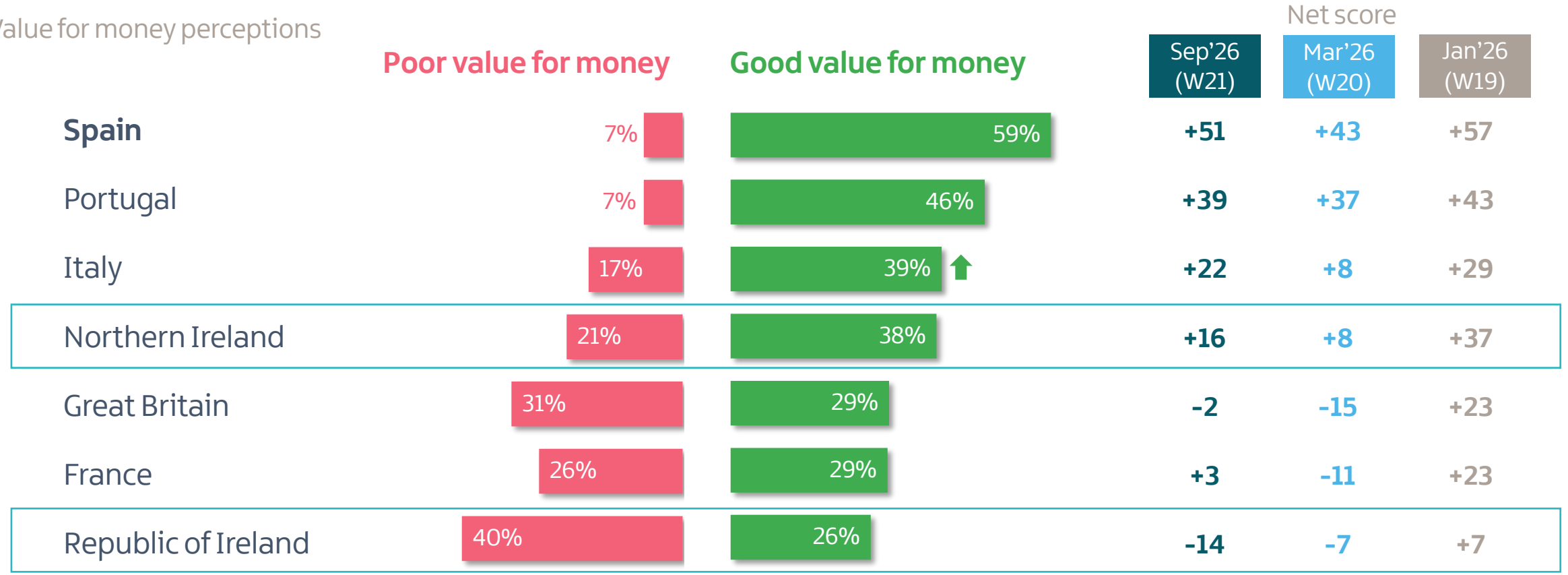


Value for money

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Northern Ireland's overall value-for-money perceptions improved slightly while ROI's declined

Value for money perceptions



sig. higher / lower than prev. wave

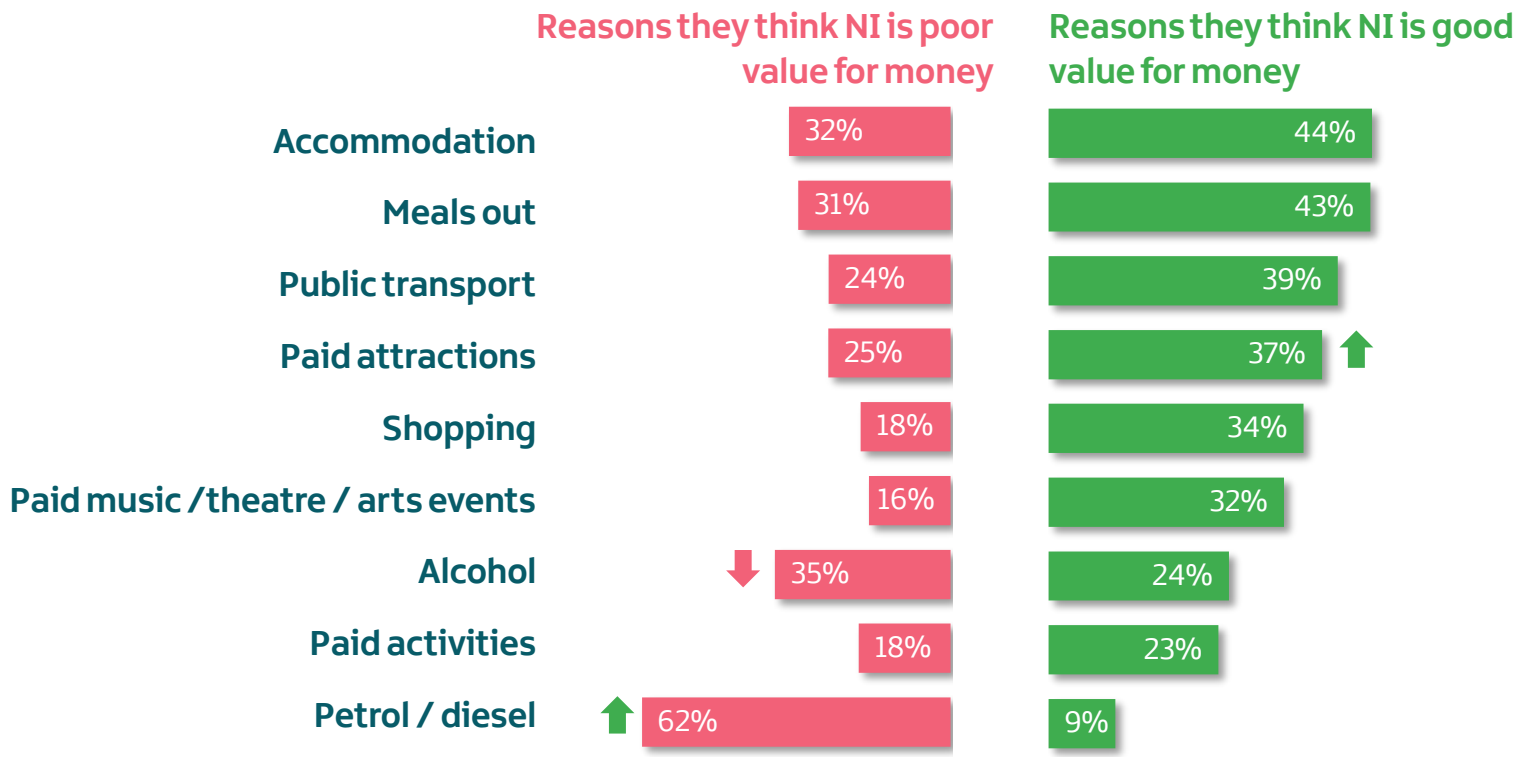
N = 400

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

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Accommodation and dining lead on value, while petrol is more likely to be seen as poor value for money

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



	Net score		
	Sep'26 (W21)	Mar'26 (W20)	Jan'26 (W19)
Accommodation	+11	+3	+35
Meals out	+13	+7	+35
Public transport	+14	+9	+12
Paid attractions	+12	+4	+16
Shopping	+16	+19	+37
Paid music /theatre / arts events	+15	+9	+12
Alcohol	-11	-25	+1
Paid activities	+4	-1	+13
Petrol / diesel	-53	-39	0

sig. higher / lower than prev. wave

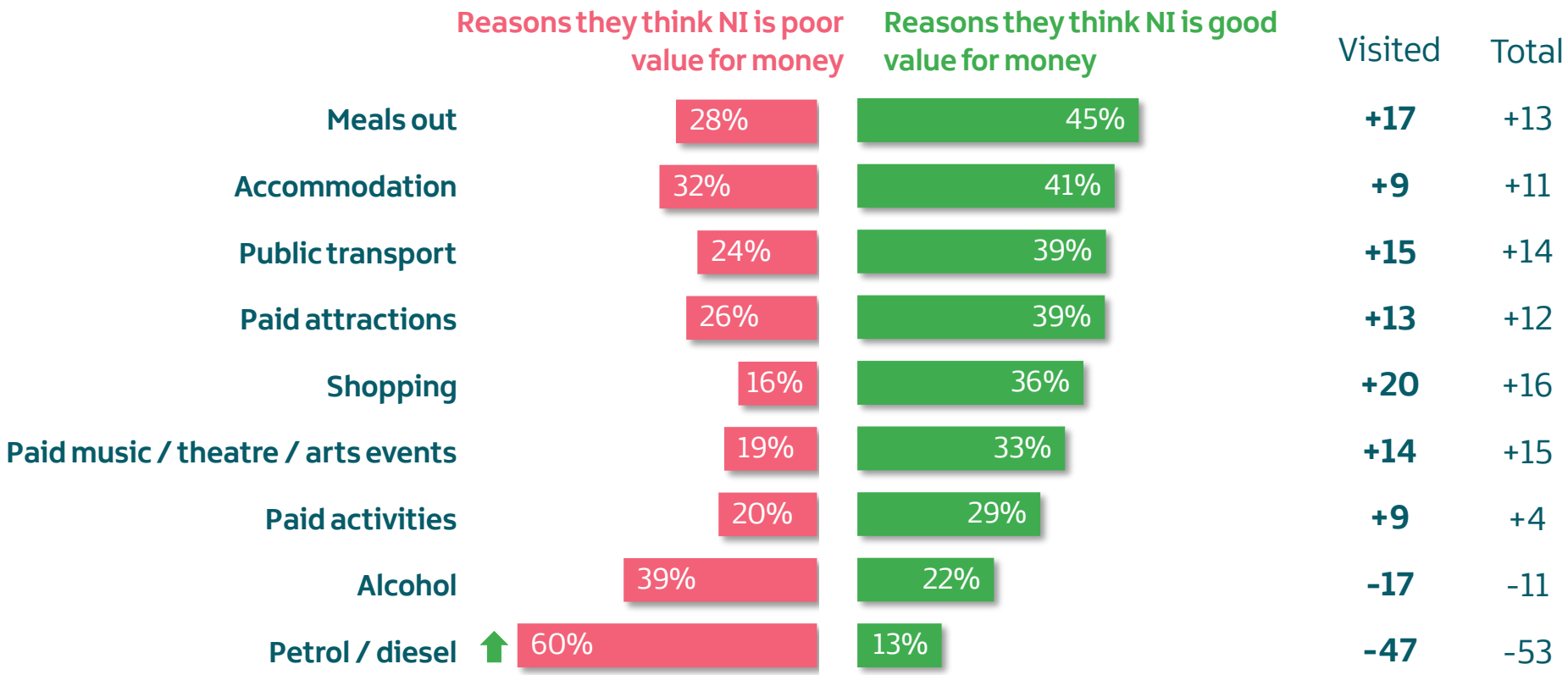
N = 400

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?

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Those who've taken a trip see greater value in meals out and shopping

Why they think NI is poor or good value for money as a holiday or short break destination – those who took a trip in NI



Those who took any trip in NI = 204

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?

TOURISM NORTHERN IRELAND

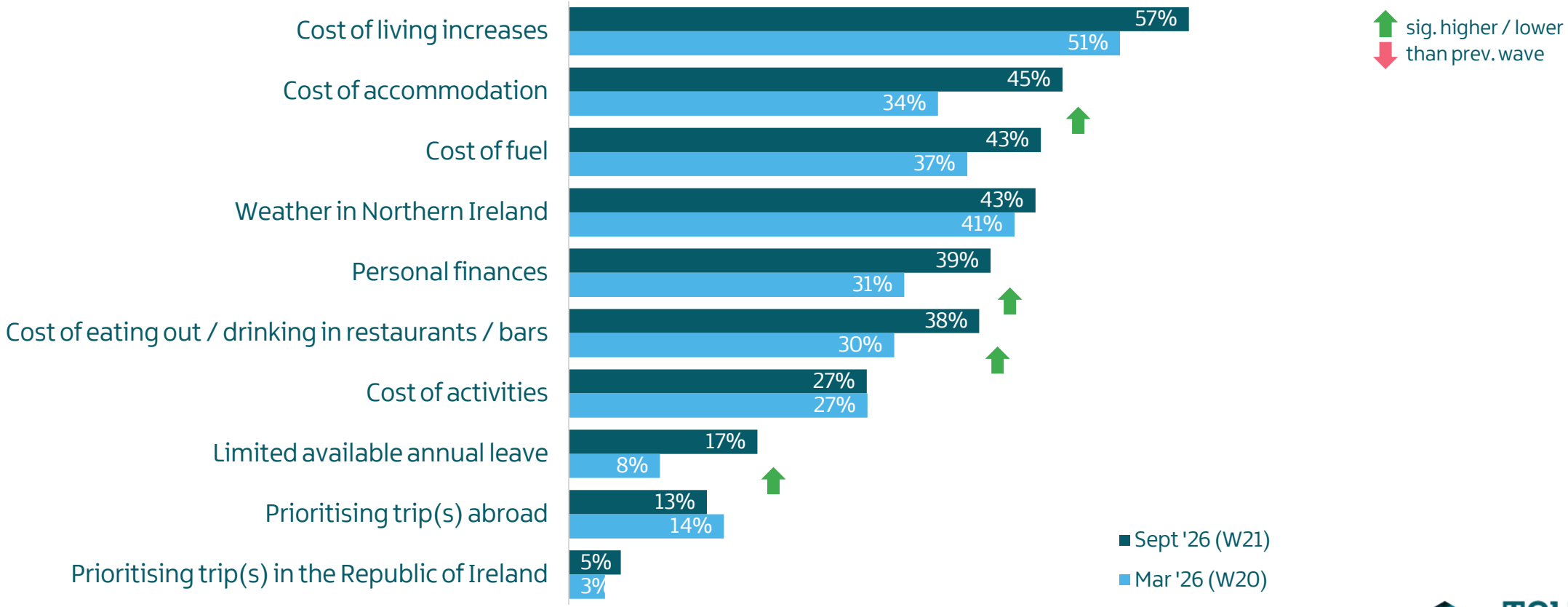


Cost of living

TOURISM NORTHERN IRELAND

Cost of living remains the biggest barrier to taking a break in NI

Barriers to taking a trip in NI



N = 400

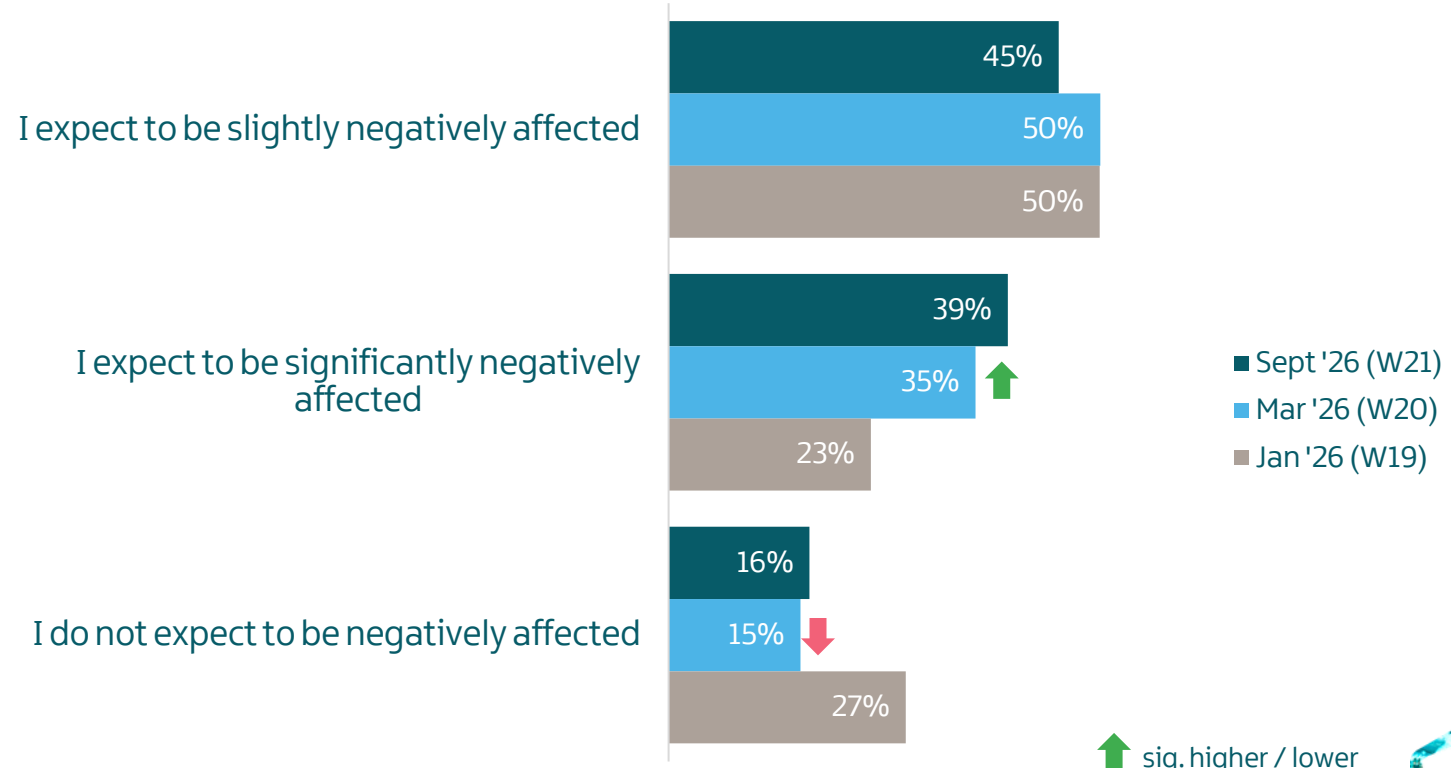
F0. Which, if any, of the following factors do you see as potential barriers to you taking a short break or holiday in Northern Ireland in the next six months?

TOURISM NORTHERN IRELAND

Cost-of-living concerns persist

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

84%
expect to be affected by cost-of-living increases



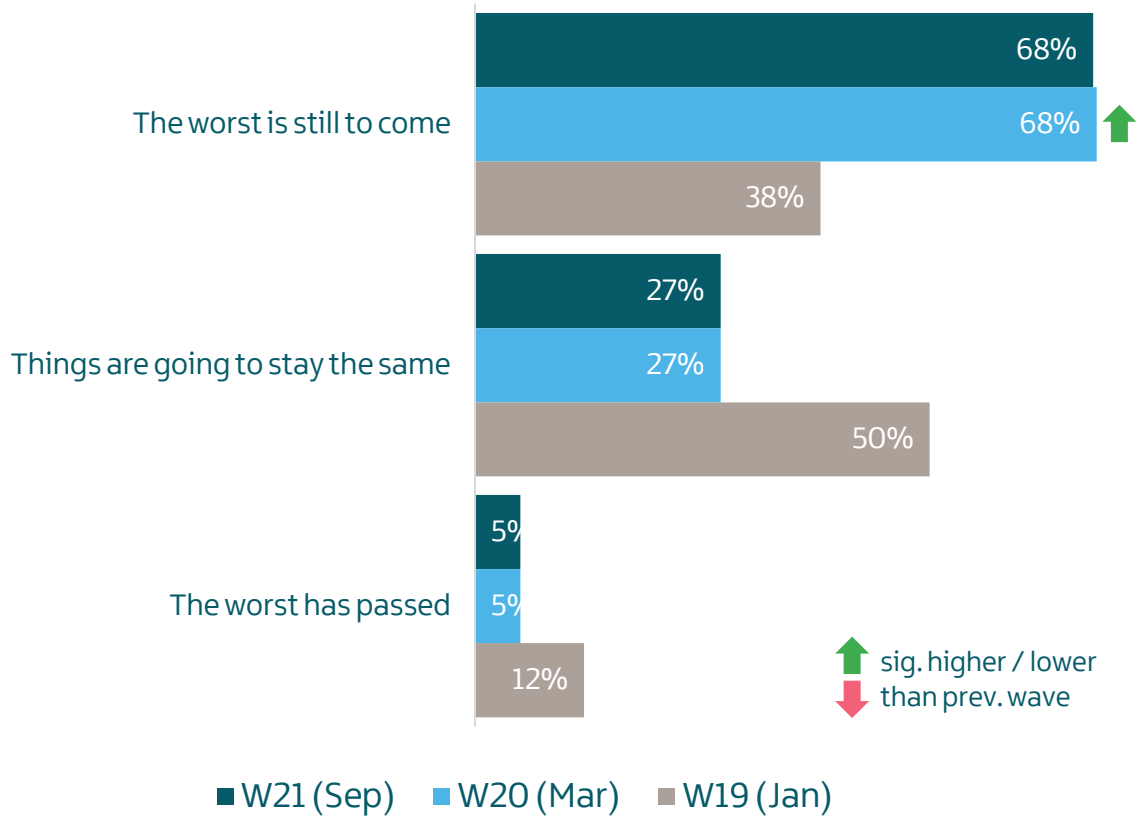
N = 400

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

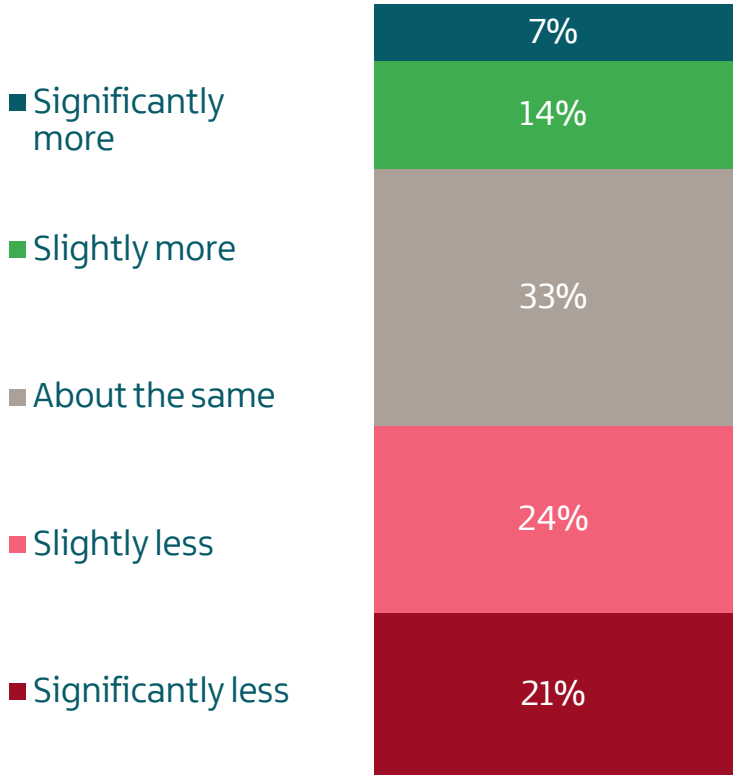
TOURISM NORTHERN IRELAND

Cost of living outlook is unchanged from last wave

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



How disposable income to spend on activities/ holidays has changed



N = 400

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



Summary

TOURISM NORTHERN IRELAND

Summary

Strong travel experiences continue to drive positive sentiment

Visitor satisfaction remains exceptionally high, with NI performing particularly well for hospitality, food and drink, outdoor experiences and attractions. These strengths continue to underpin positive perceptions of the destination and support repeat visitation.

NI demand remains resilient

Intentions to take short breaks within NI have increased, however growth is more pronounced for ROI breaks. While overseas holidays remain desirable, growing numbers are considering destinations closer to home, reflecting changing travel behaviours and an increasing focus on convenience and value.

Value perceptions improve amid ongoing financial pressures

NI's value-for-money ratings have improved and continue to compare favourably with neighbouring destinations. However, cost-of-living pressures persist, with reduced disposable income and rising accommodation costs remaining key barriers to travel. Overall, domestic demand remains steady, supported by positive visitor experiences and a competitive value proposition, but competition from ROI breaks is strong .