Tourism Northern Ireland Consumer Sentiment Research

ROI 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 Republic of Ireland (ROI) market. We have continued to look at consumer attitudes towards travel in Northern Ireland (NI) and elsewhere, monitoring changes throughout 2026 and intentions for the remainder of the year and early 2027.

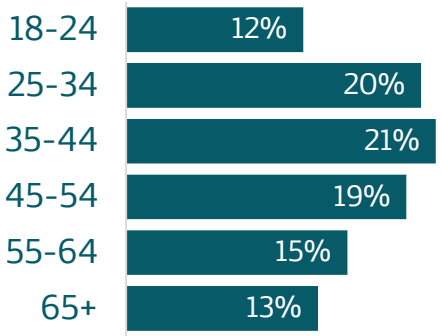
Objectives:

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

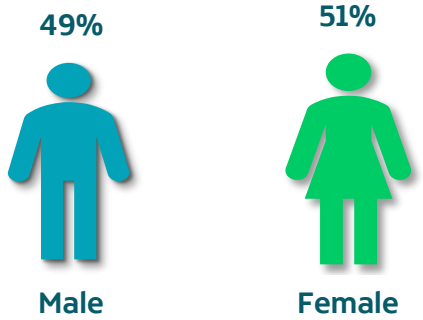
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We spoke to a robust, nationally representative sample in the Republic of Ireland

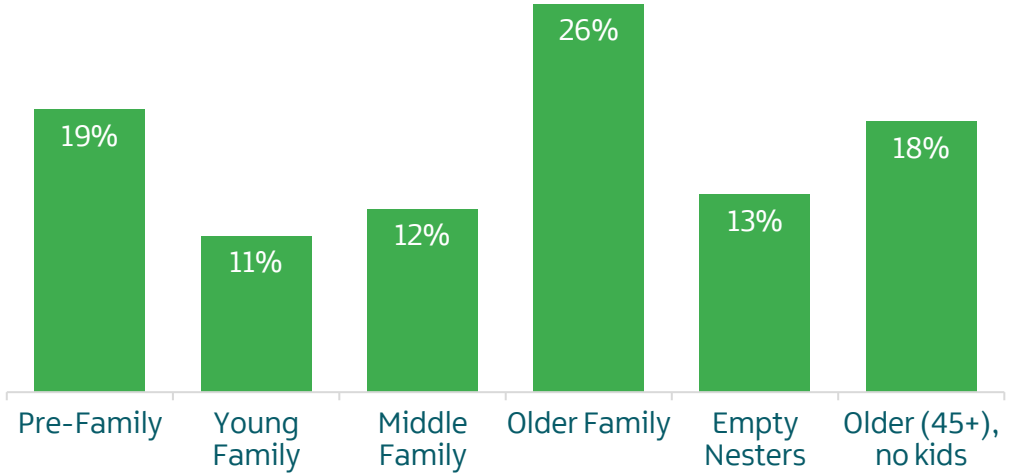
Age



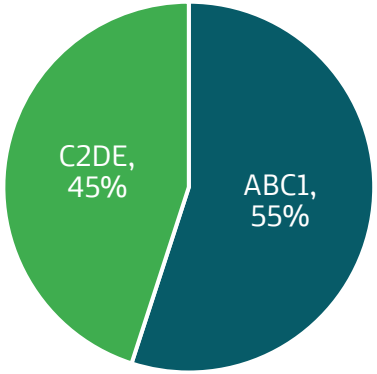
Gender



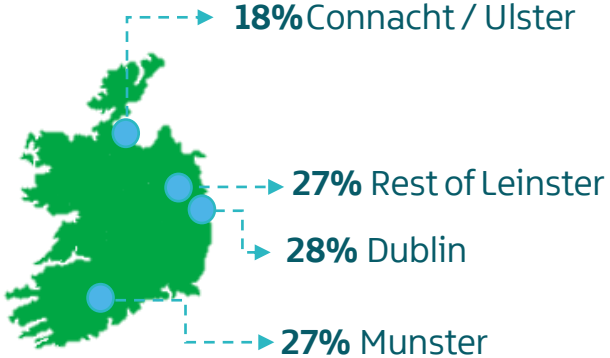
Lifestage



Socio



Region



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N=750, fieldwork was conducted between 16th – 30th September

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3 Value for money

4 Cost of living

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Travel experiences

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Trips to NI have increased slightly, driven mainly by greater short-break uptake, with fewer trips abroad

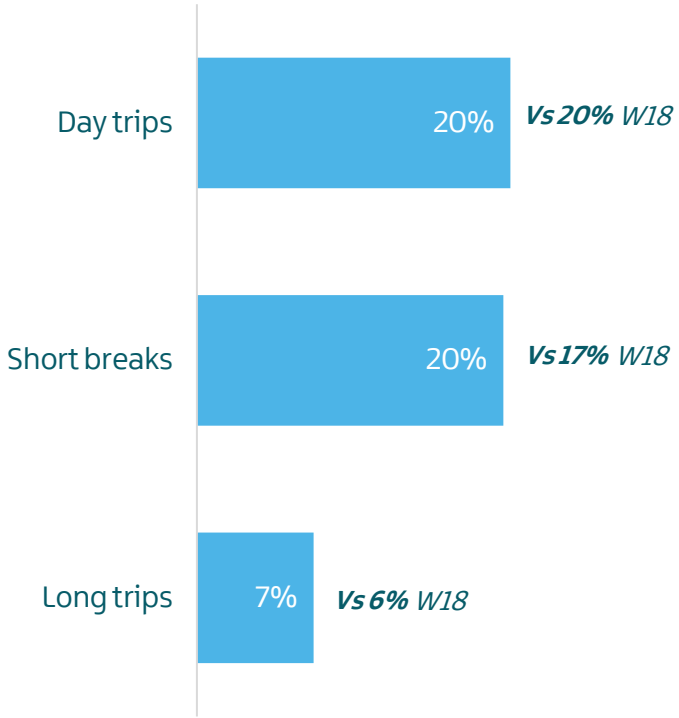
24%

***Vs 20%** 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 to NI



Other than NI...

44% took a break in ROI
Vs 44% W18

46% went abroad
Vs 52% W18

25% didn't travel at all
Vs 26% W18

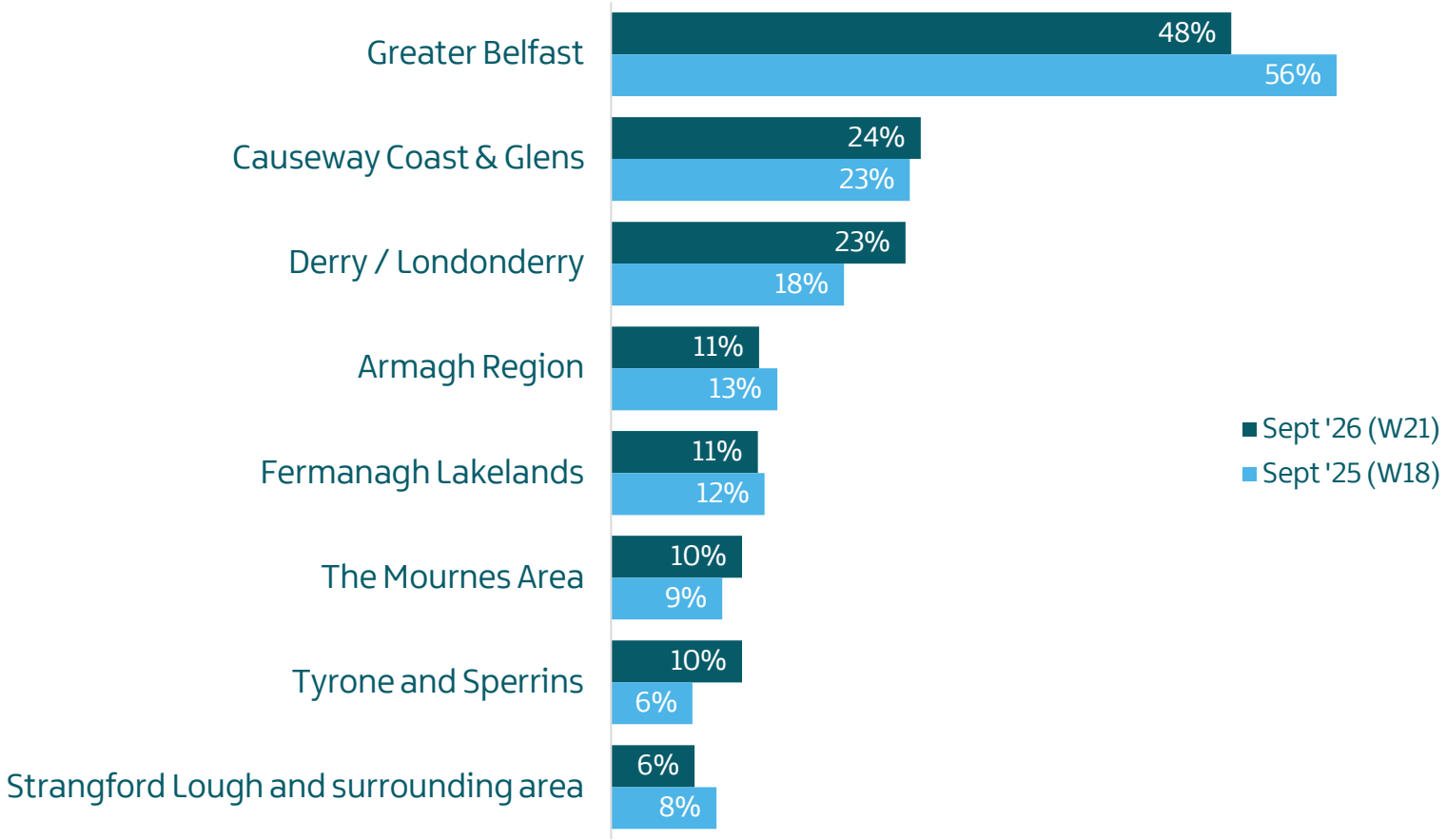
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N = 750

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

Belfast remains the main draw, while visits to Derry~Londonderry and Tyrone increase

Where they visited in NI in 2026



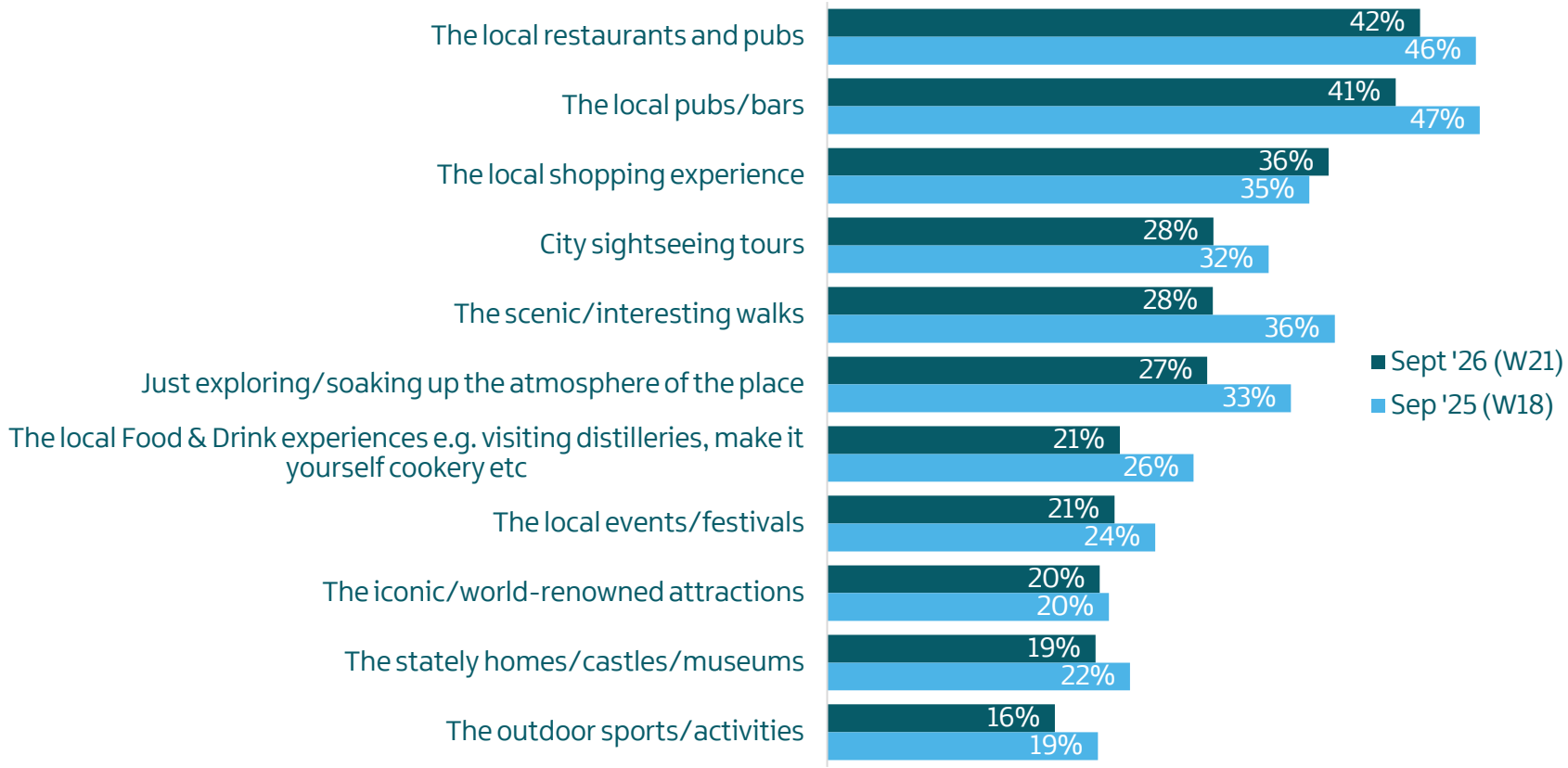
N = 266 took any trip in NI in 2026 (inc. day trips)

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

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Visitors are most engaged by everyday local experiences, not just headline attractions

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



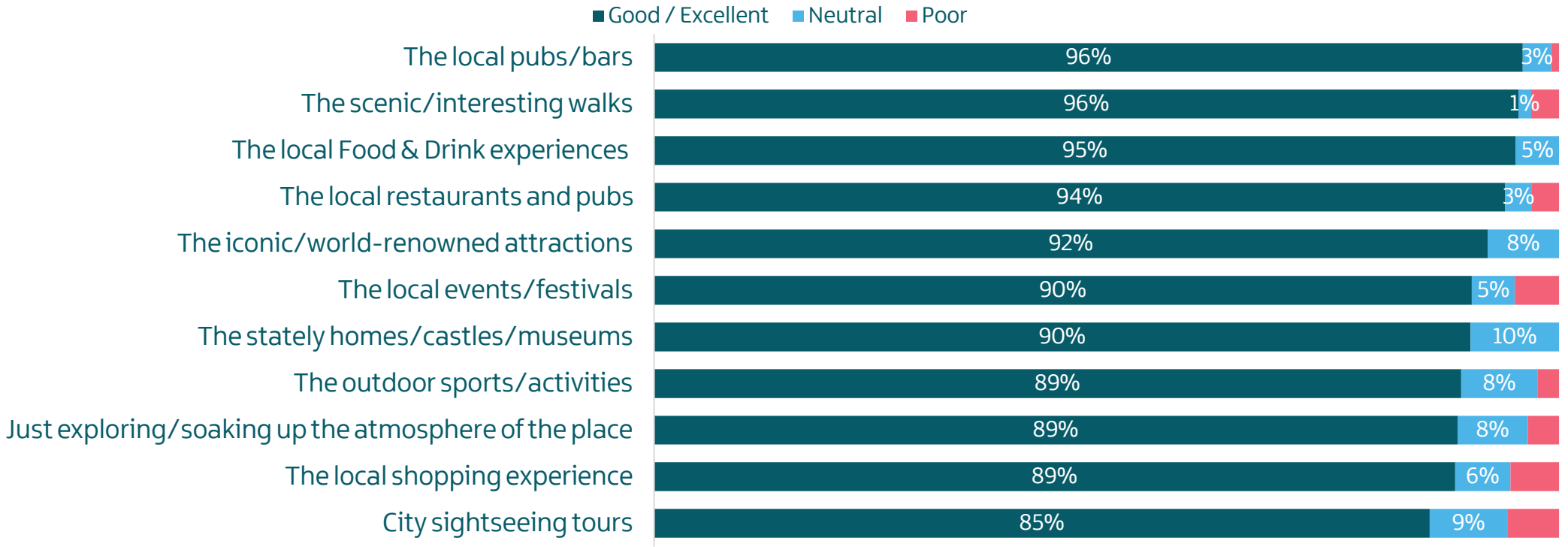
N = 177 took a short or long break in NI in 2026

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 and bars, scenic walks, and food and drink experiences

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



N between 38 and 110 (depends on which activities undertaken)

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

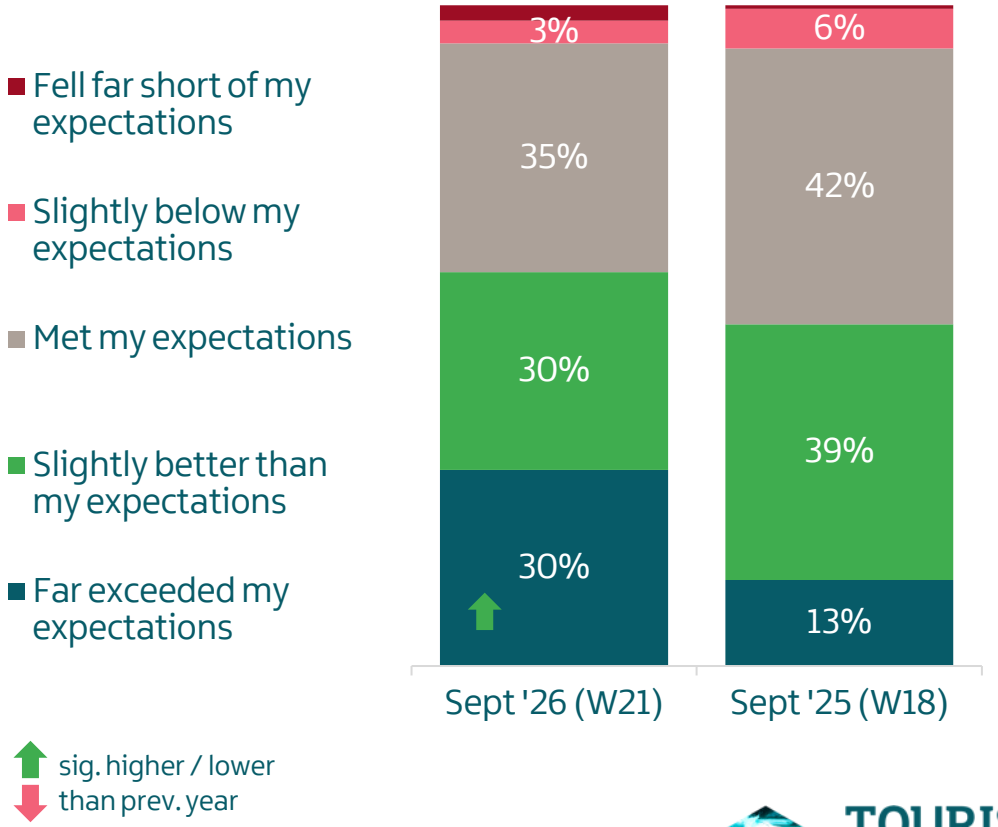
Trips are more likely to far exceed visitors' expectations than last year

94%

had their expectations met or exceeded

Vs 93%
Wave 18 (Sept '25)

Those who visited NI felt their trip...



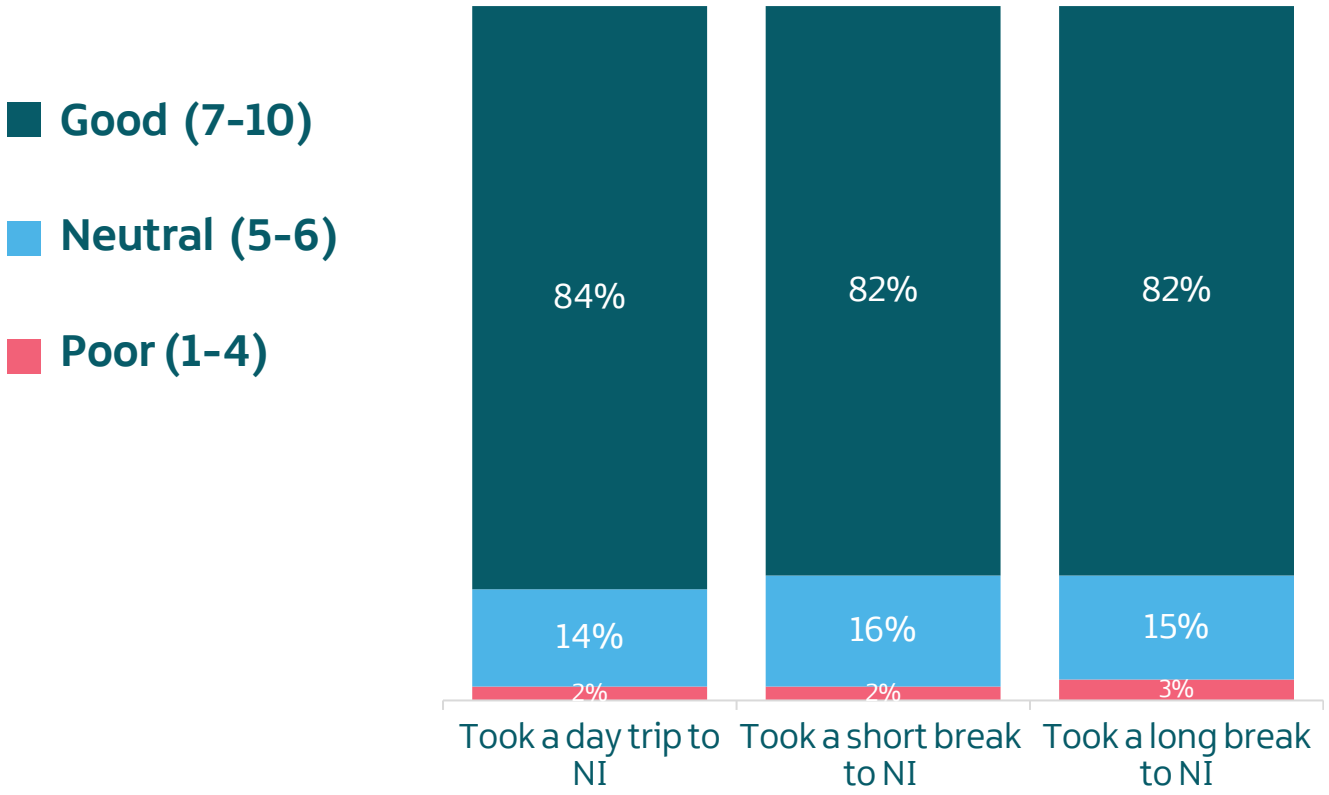
N = 266 took any trip in NI in 2026 (inc. day trips)

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

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Recent visitors rate their NI trips highly, with more than 8 in 10 scoring 7 or above across all trip types

Trip ratings



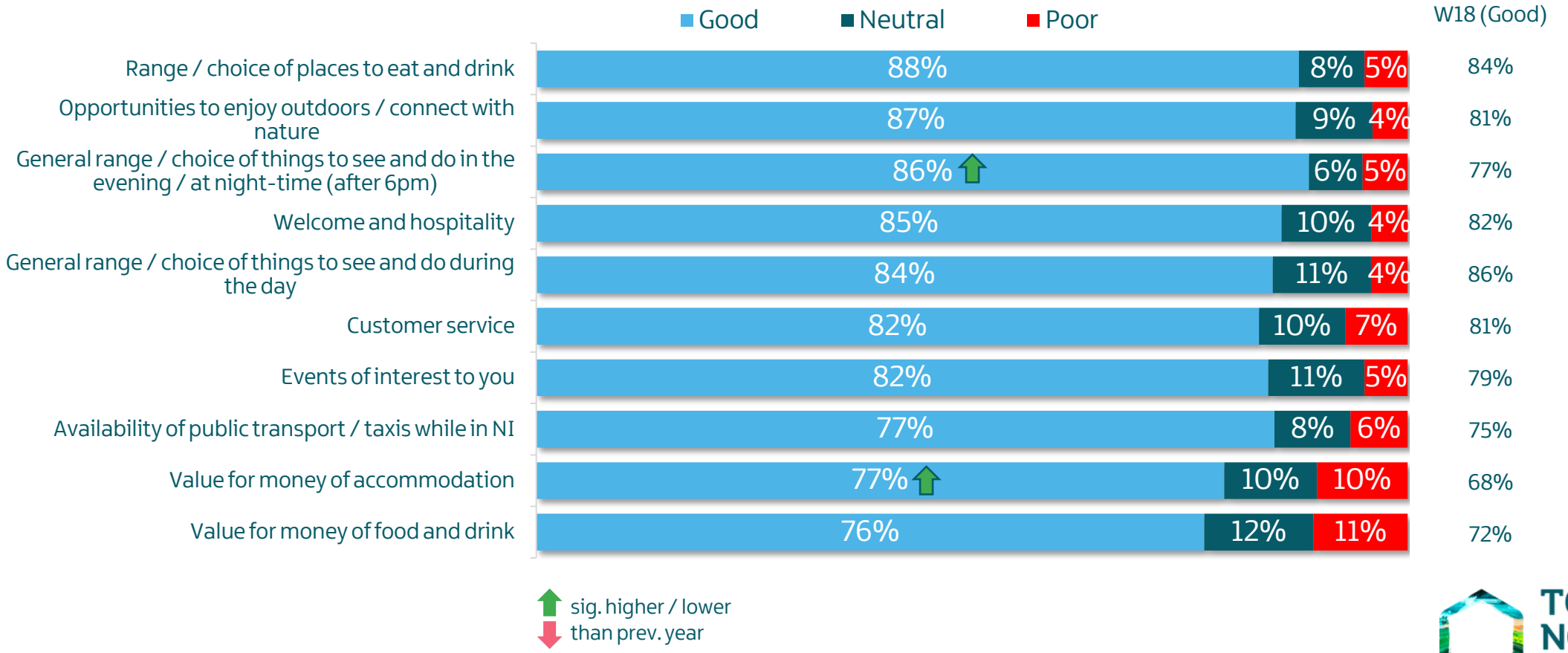
N = 151 took a day trip to NI, 148 took a short break & 56 took a long break

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 dining choice, outdoor activities and evening entertainment

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



N = 266 took any trip in NI in 2026 (inc. day trips)

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

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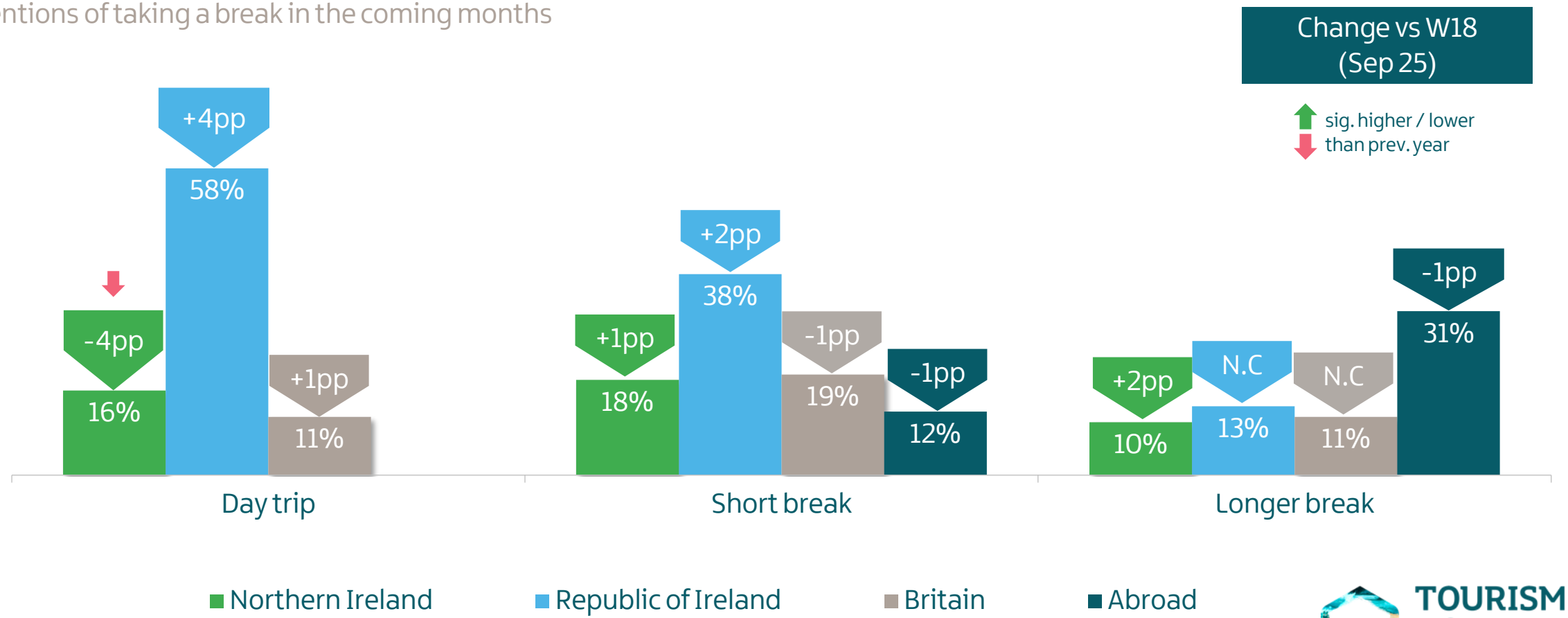


Travel intent

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NI day-trip consideration has fallen, with short and long break intentions largely stable

Intentions of taking a break in the coming months



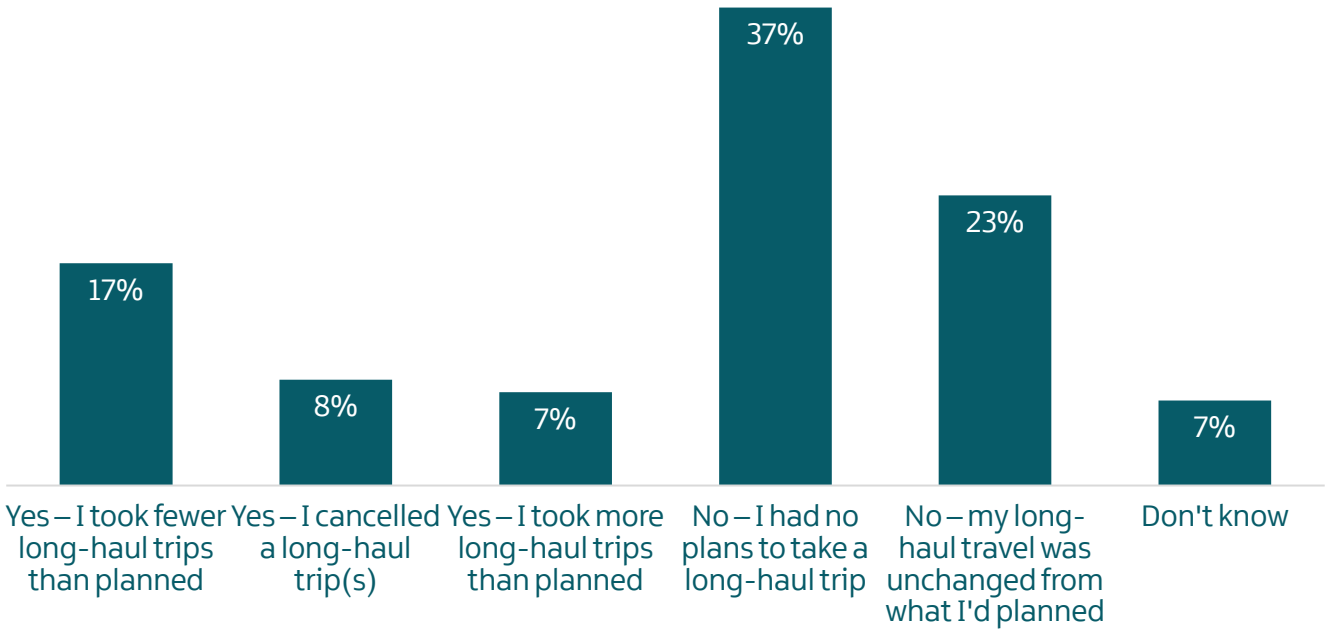
N = 750

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 September to December?

TOURISM NORTHERN IRELAND

A quarter have cut or cancelled long-haul plans, with 1 in 4 visiting NI instead

Plans regarding long-haul trips



Among those who cancelled – they visited the following instead

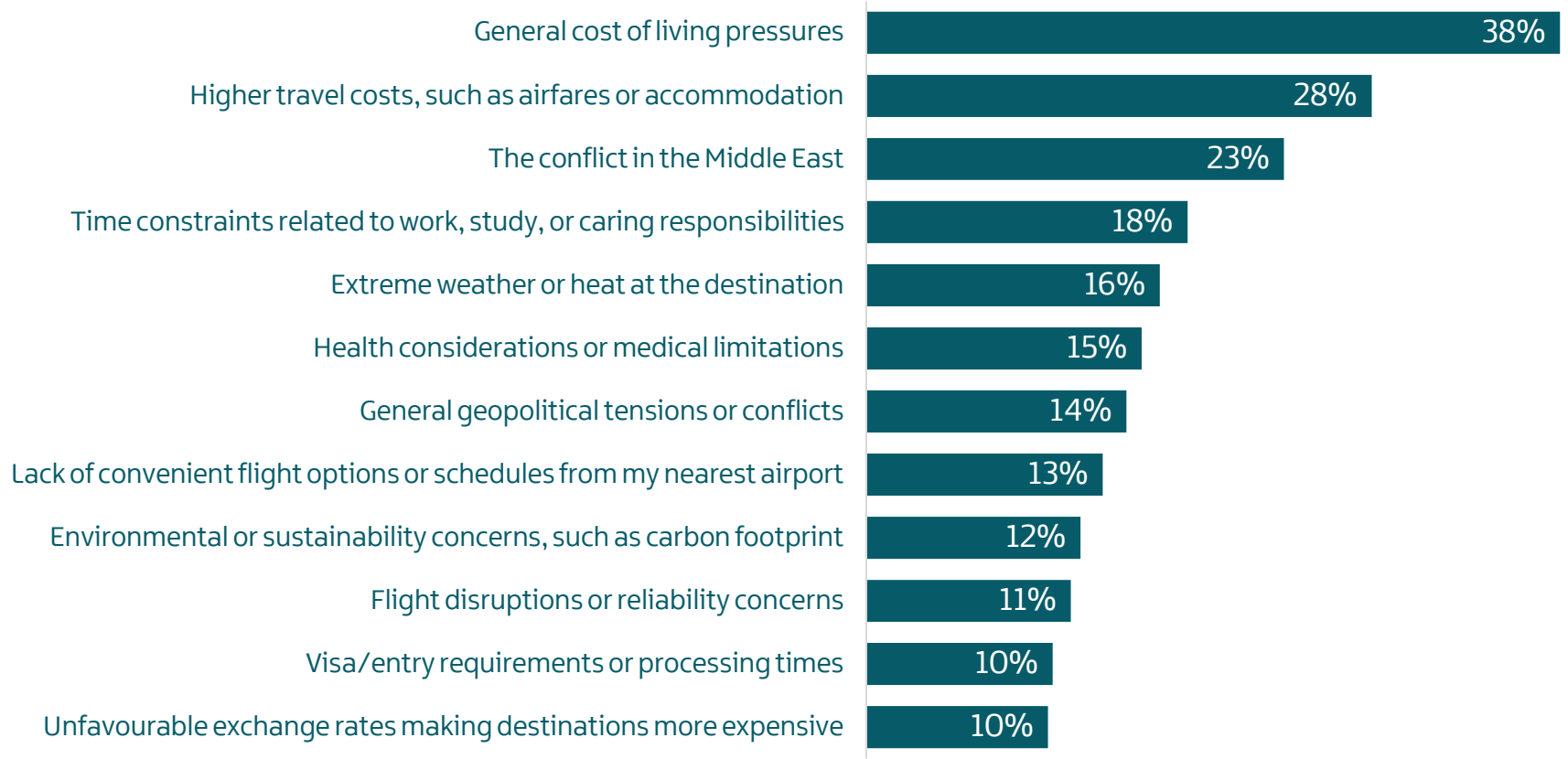
- 50% Republic of Ireland
- 23% Northern Ireland
- 19% Mainland Europe
- 12% Great Britain

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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?

Cost pressures were the main reasons for cancelling or reducing long-haul trips

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



TOURISM NORTHERN IRELAND

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?

Overseas holidays remain a priority, but extreme weather is prompting over half to reconsider travel to southern/ central Europe

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



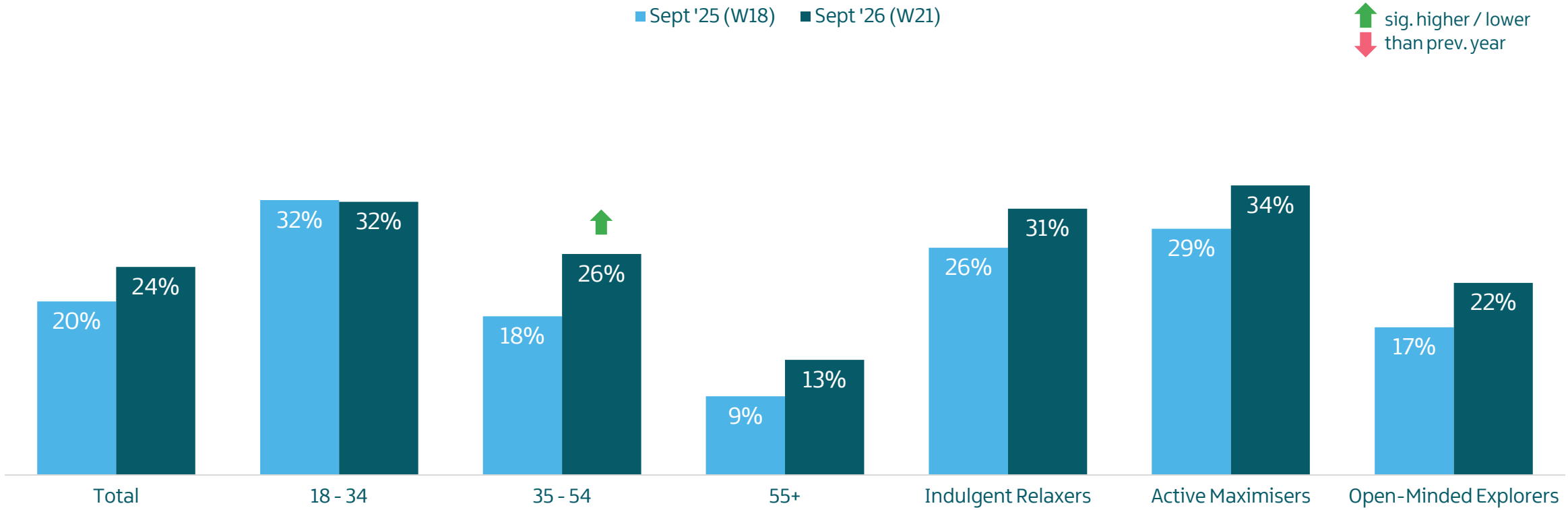
N = 750

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

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Trip intention has risen among 35-54s, while over 55s continue to show lower intent to visit

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

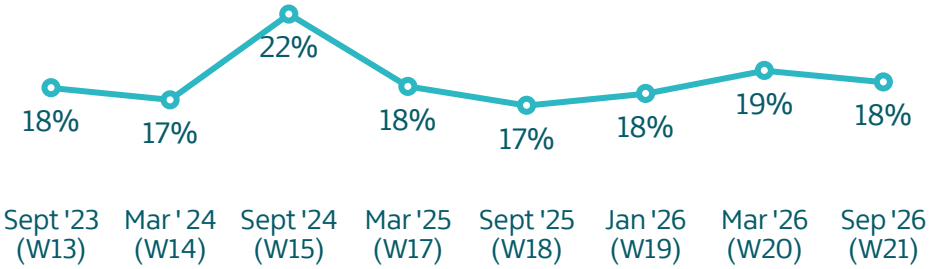


N = 750

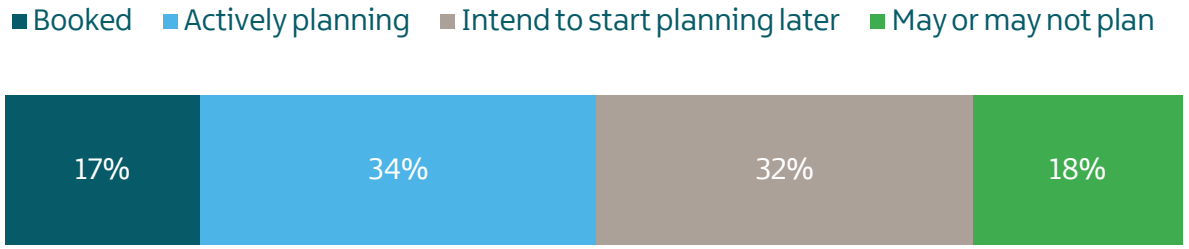
E1b/c/d. Would you consider taking a short break of at least 1-3 nights / longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (September to December)?

Half of short-break considerers have booked or are actively planning, with December most popular

18%
are considering a short break in NI in Sep - Dec

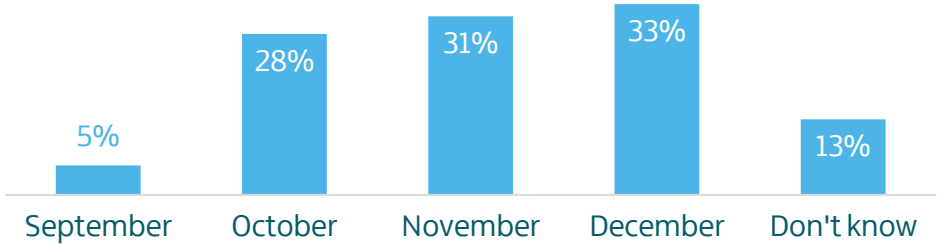


Status of short break – have they booked?



51% of those considering a short break are actively planning or have booked a trip to NI – **9%** of the total sample

Short break planned for



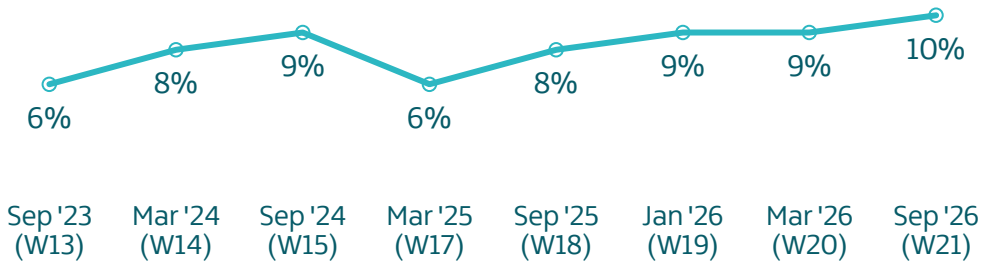
N = 750 / 138 considering short break

TOURISM NORTHERN IRELAND

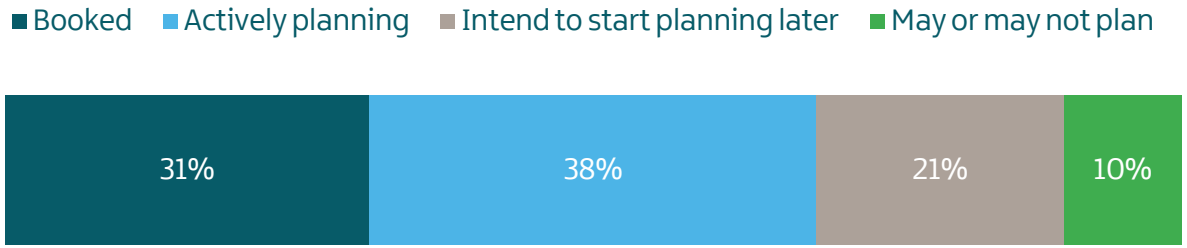
E1b. Would you consider taking a short break of 1-3 nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (September to December)?/ E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland/ E3. Have you booked or thought about planning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

Among long-break considerers, 7 in 10 have already booked or are actively planning

10%
are considering a long break in NI in Sep - Dec

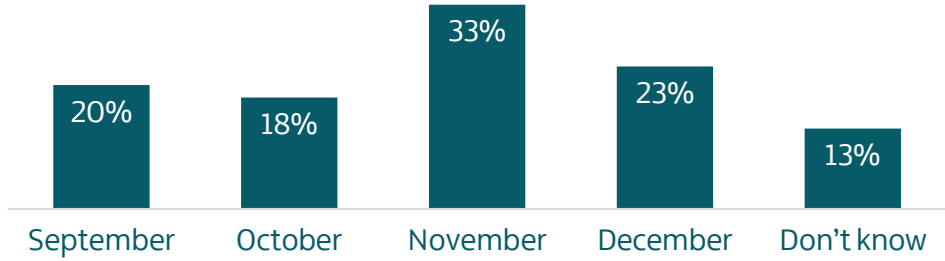


Status of long break – have they booked?



69% of those considering a long break are actively planning or have booked a trip to NI – **7%** of the total sample

Long break planned for



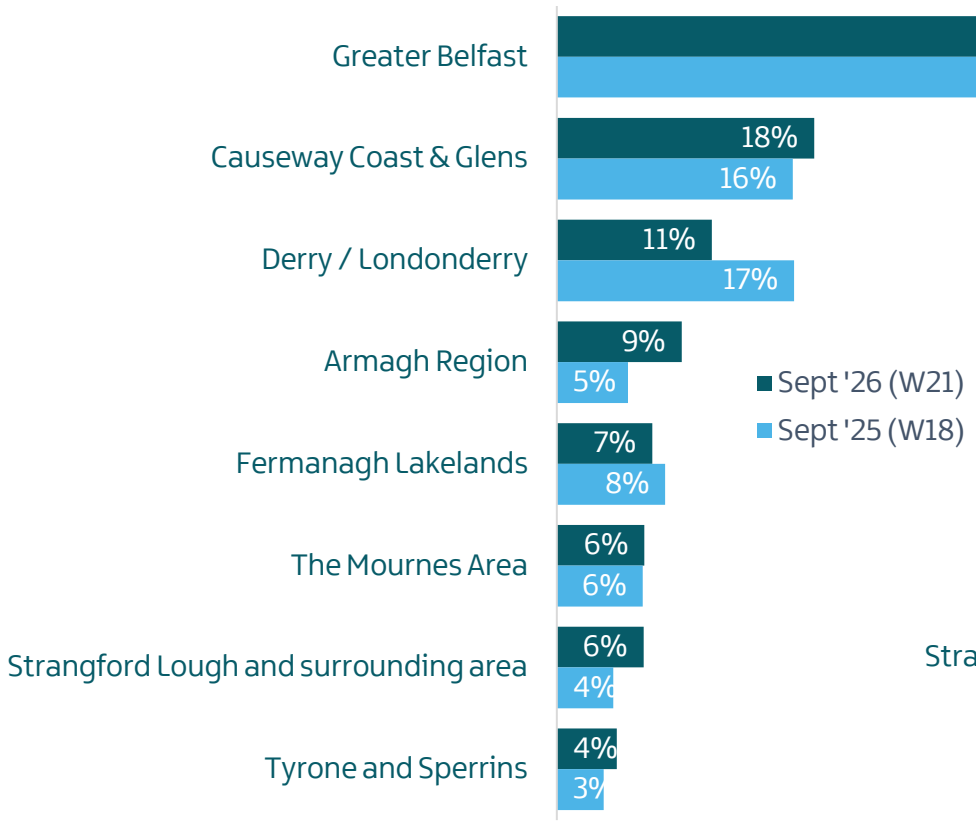
N = 750 / 77 considering long break

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?

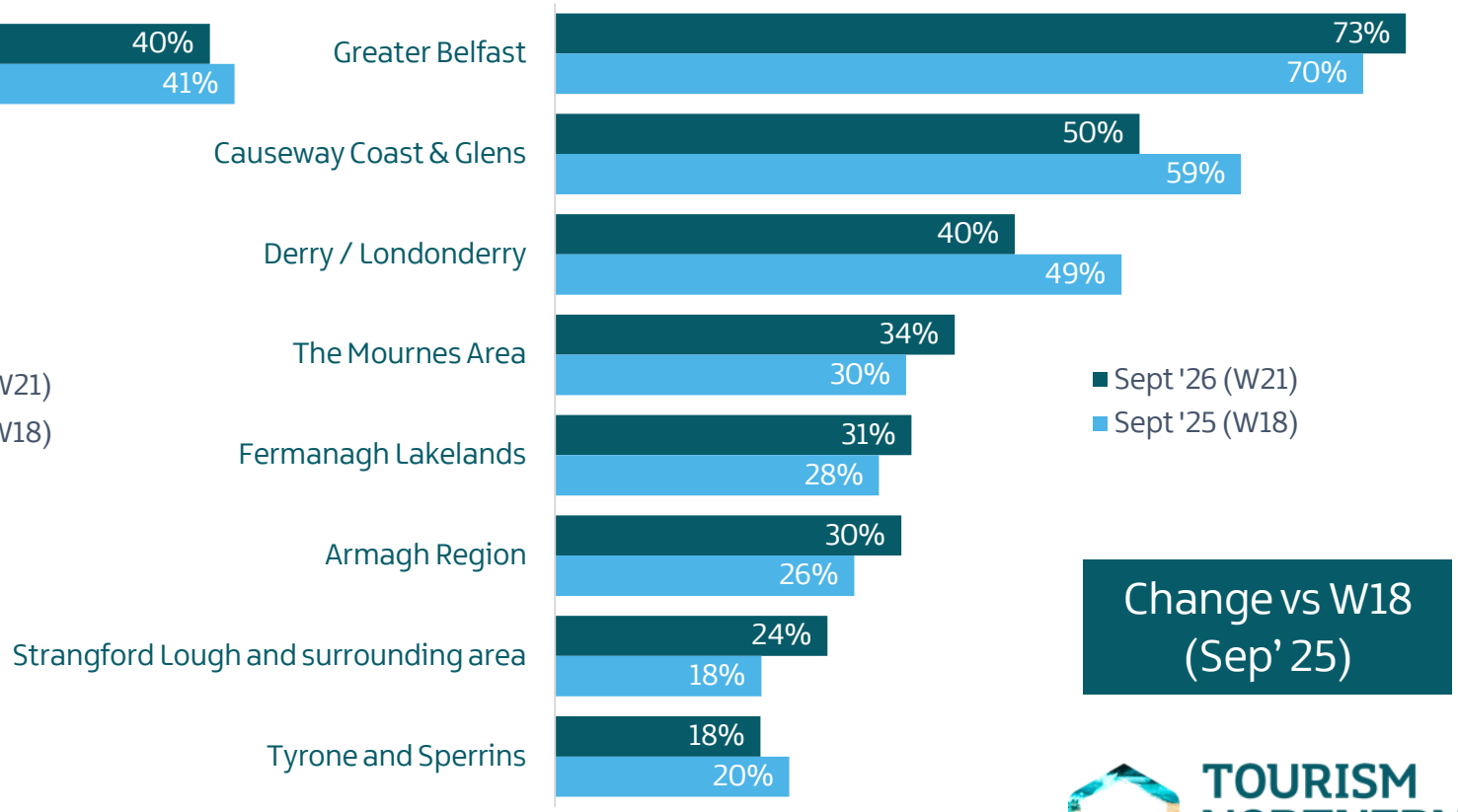
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Belfast remains most considered destination; Causeway Coast overtakes Derry~Londonderry in consideration

Destinations selected as no. 1 consideration for next trip



Destinations in top 3 consideration for next trip



Change vs W18 (Sep' 25)

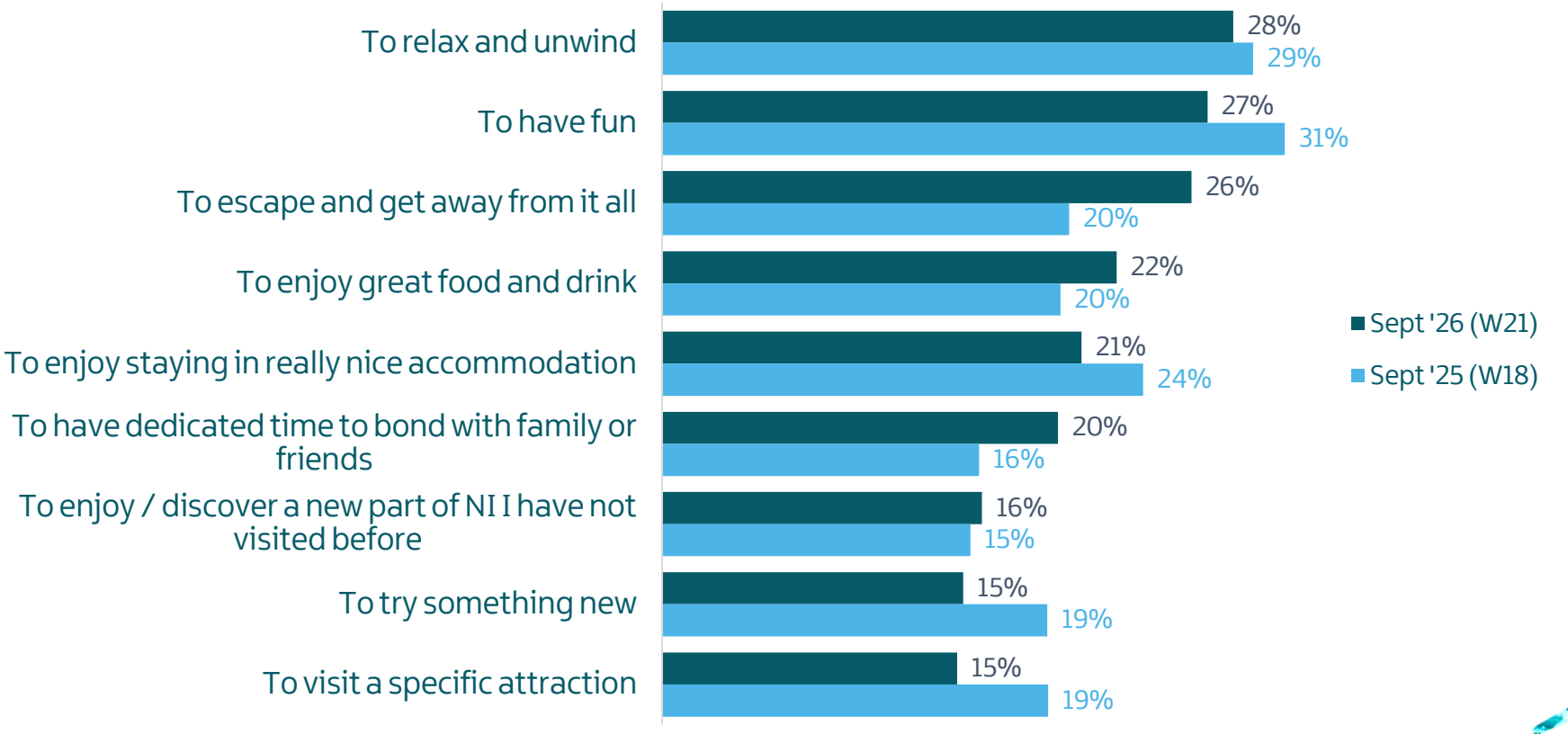
N = 181 considering a long or short break

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 and fun remain the leading trip motivations, while escapism has moved up the ranks

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



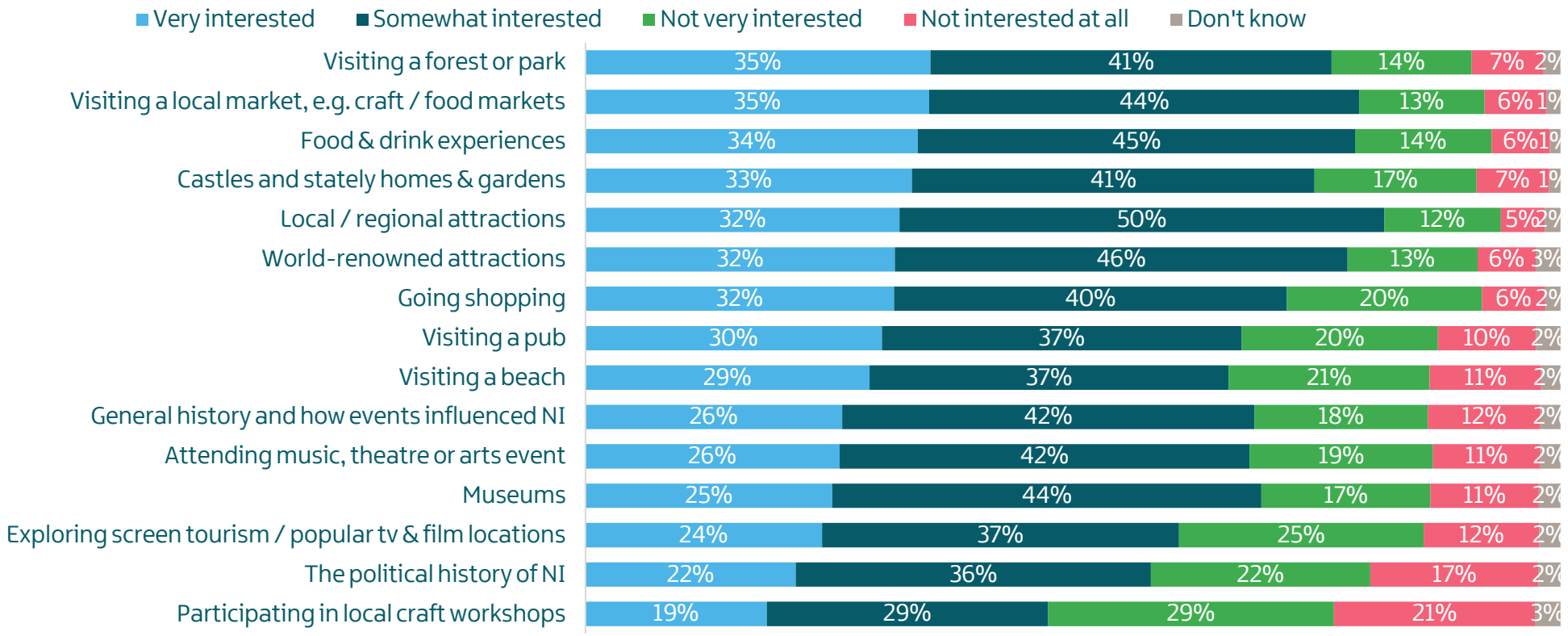
N = 181 considering a long or short break

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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Forests, parks and food & drink experiences generate the strongest interest among those considering a NI break

Interest in NI experiences



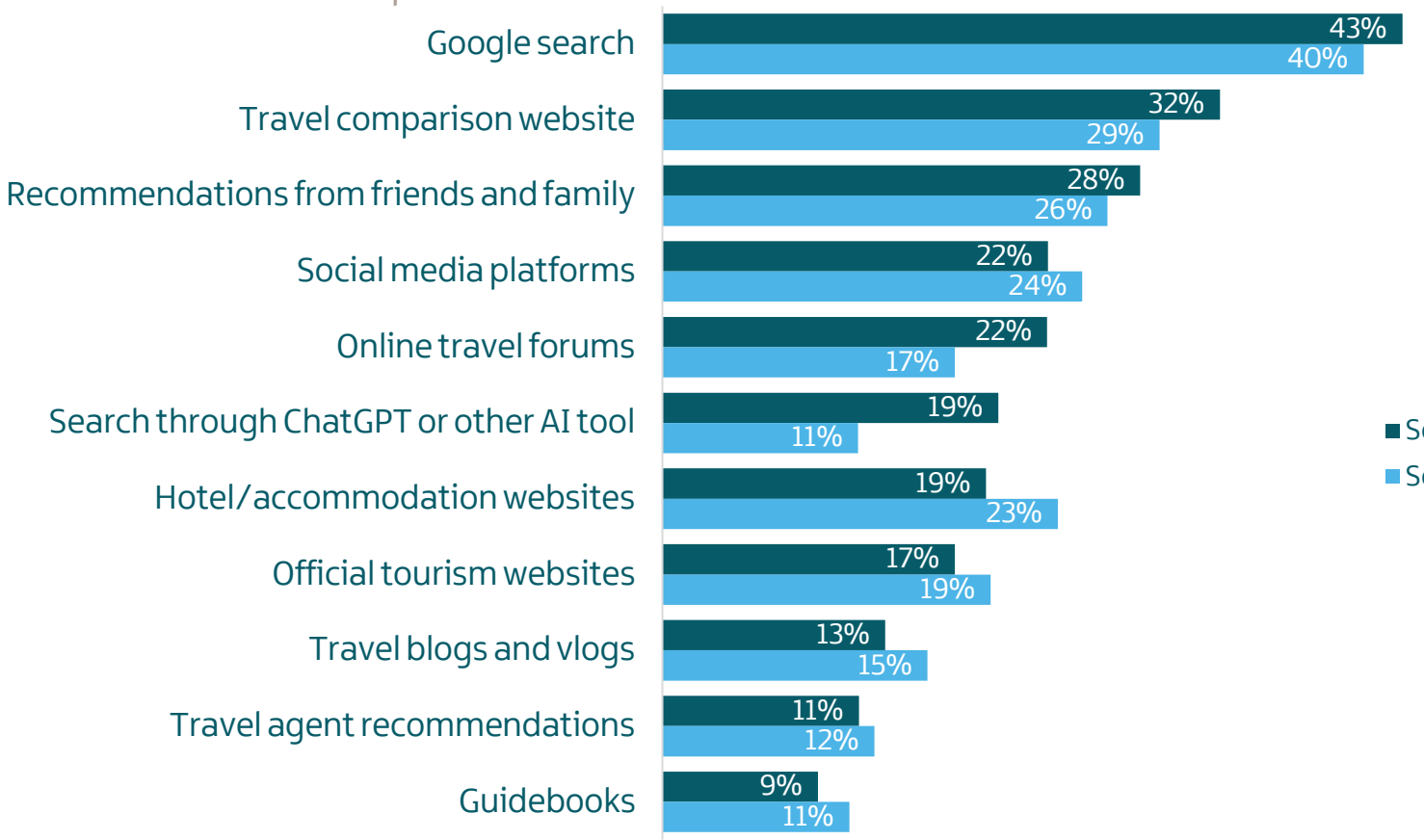
N = 750

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 first port of call for trip research, ahead of comparison sites and recommendations

How people plan to research their trip



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

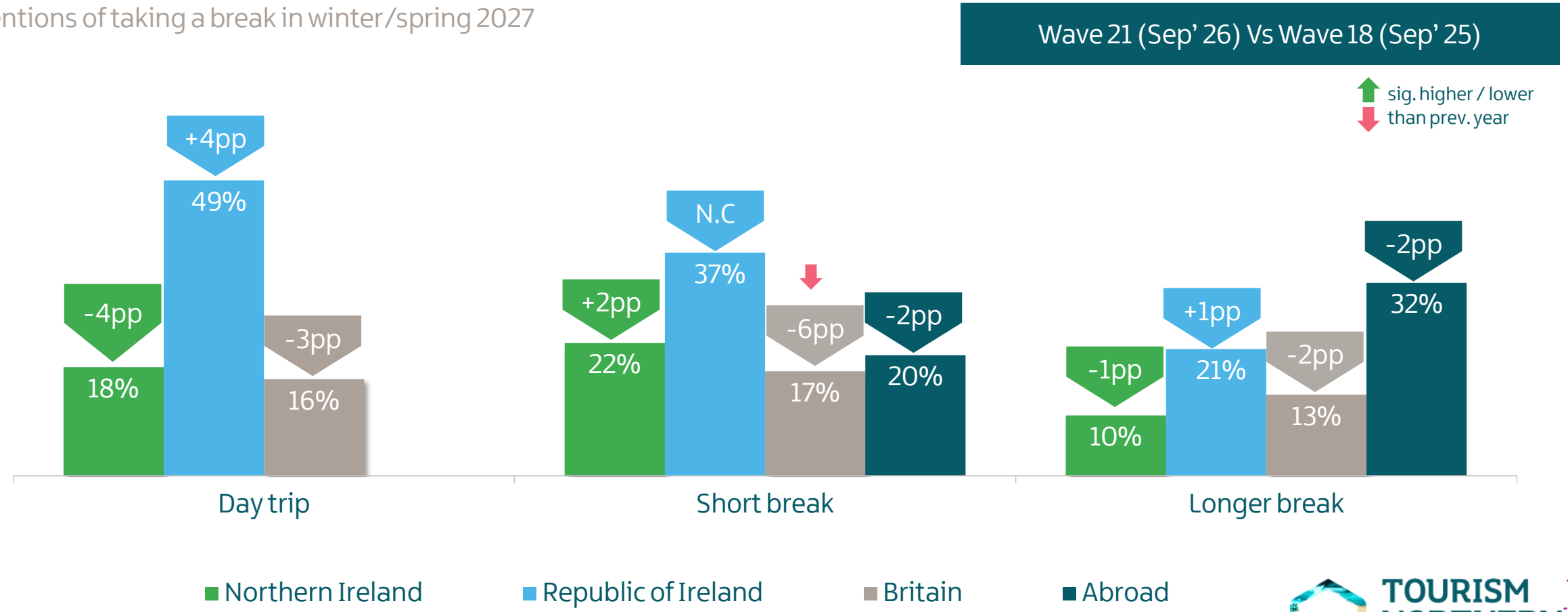
N = 154 planning long or short break (excl. "may or may not plan")

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

For winter/spring 2027, day trip intentions drop back for NI with ROI growing; overnight trips are stable

Intentions of taking a break in winter/spring 2027



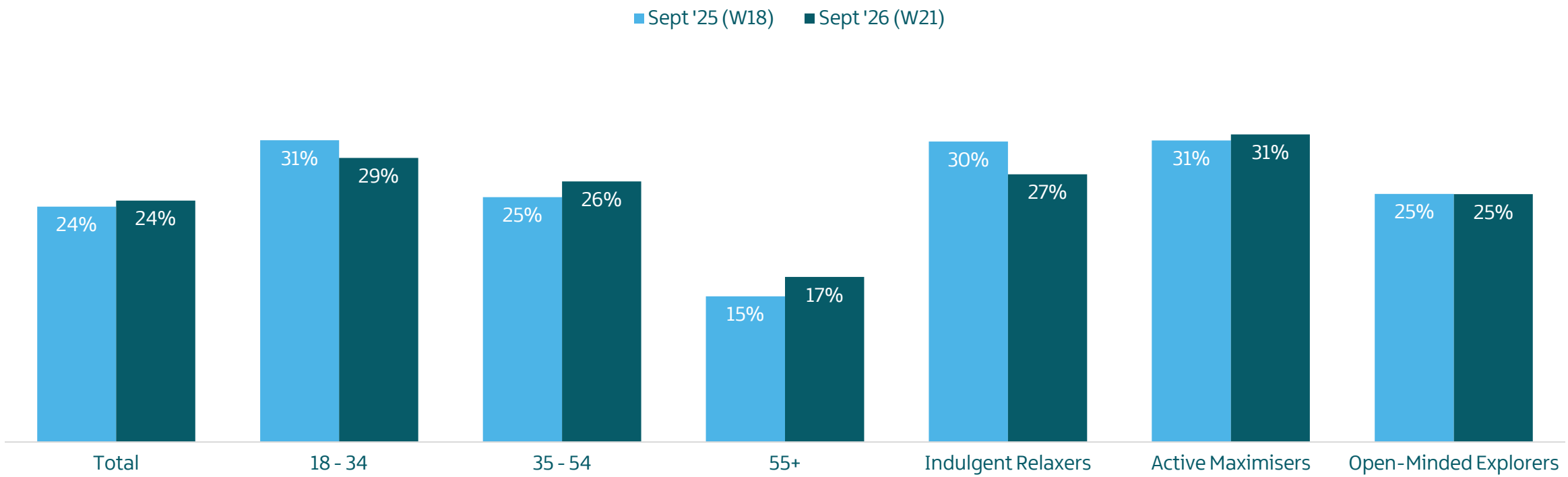
N = 750

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 interest in NI is steady overall, while under 35s show the most inclination to visit

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

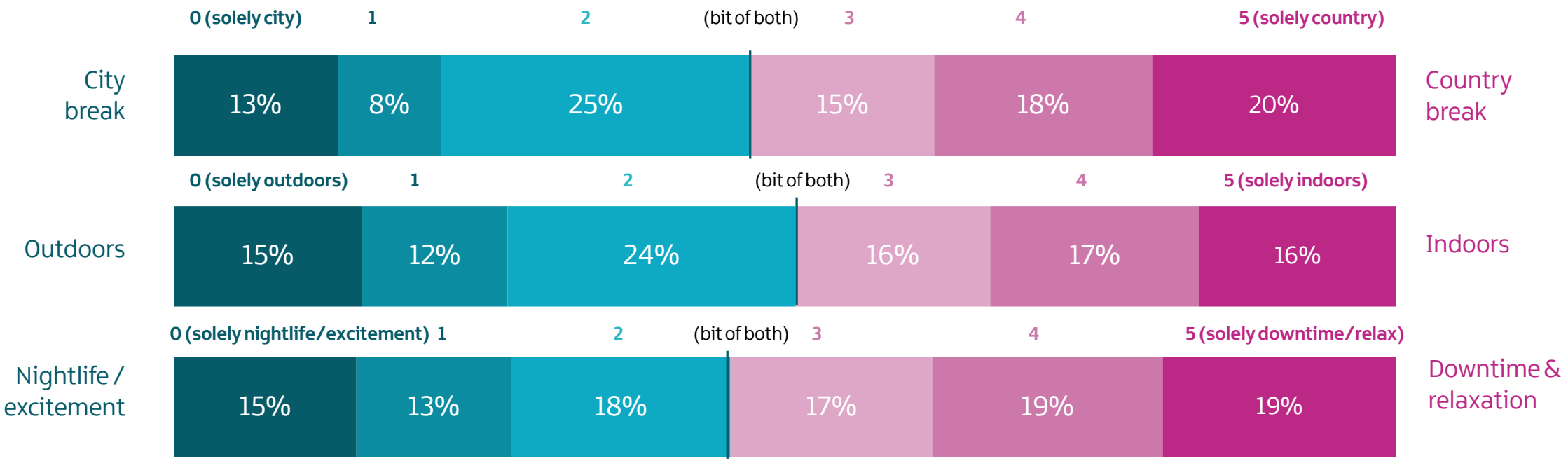


N = 750

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 visitors looking for a mix of experiences

Type of break considered in NI



N = 181 considering long or short break

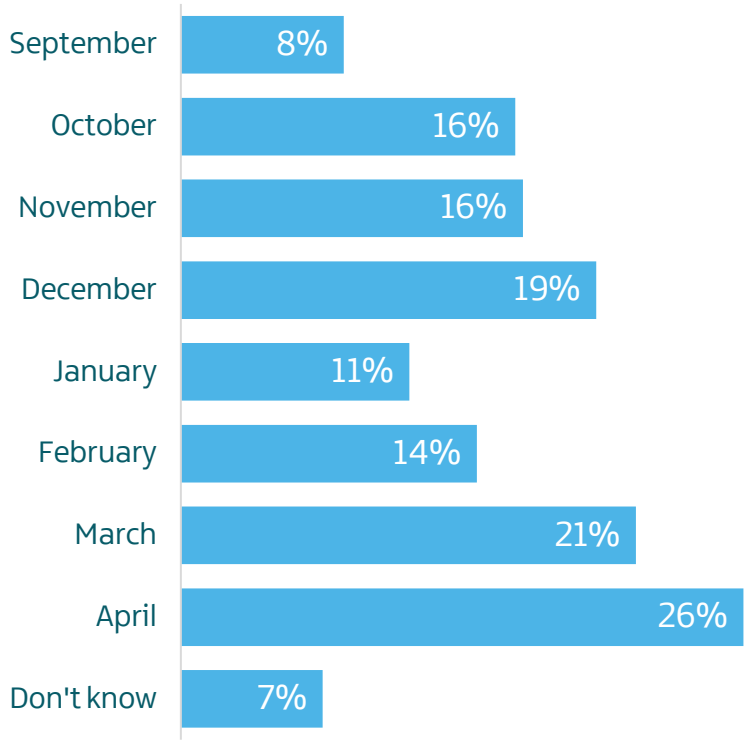
E13. If you were to consider taking a trip in Northern Ireland, what type of break would you imagine it to be?
E25. Thinking about the short/long trip(s) you said you would consider for in winter/spring 2027 in Northern Ireland, have you booked or thought about planning this short/long trip?

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

46% of total sample are considering a break abroad in the next 6 months
(Vs 49% W18)

62% of this cohort are actively planning or have booked their trips
(Vs 65% W18)

When trips abroad are planned for



N = 347 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?

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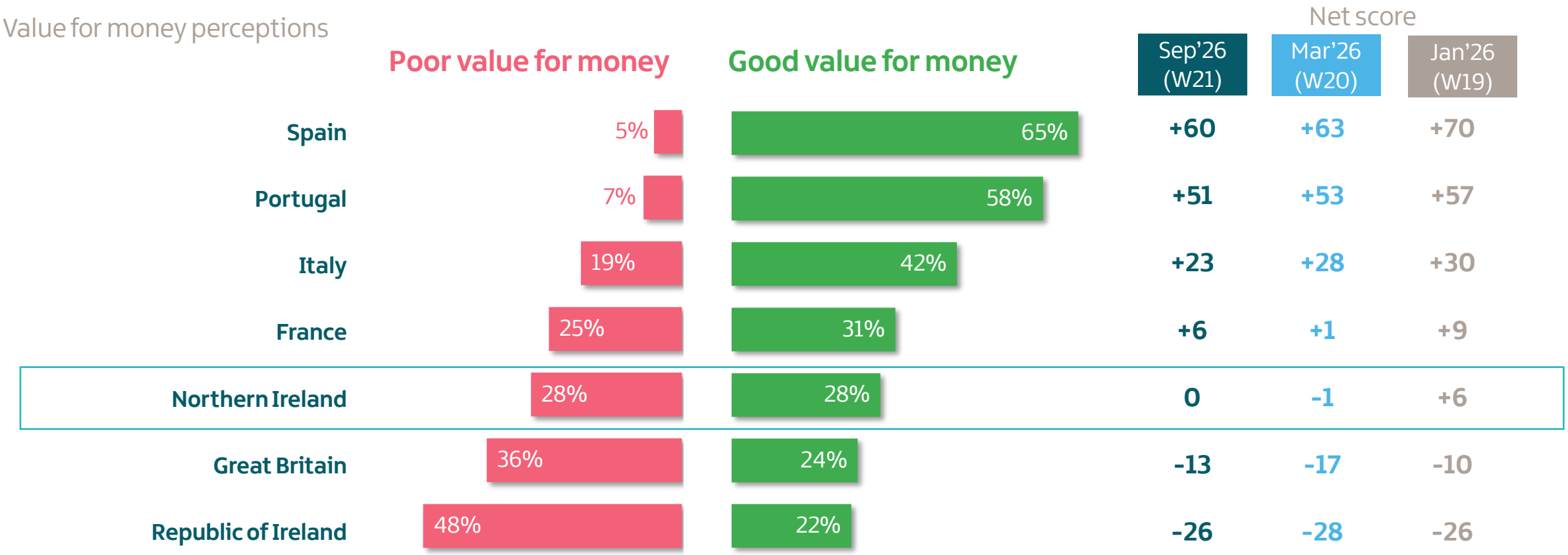


Value for money

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Value-for-money perceptions remain stable, with Spain and Portugal continuing to lead

Value for money perceptions



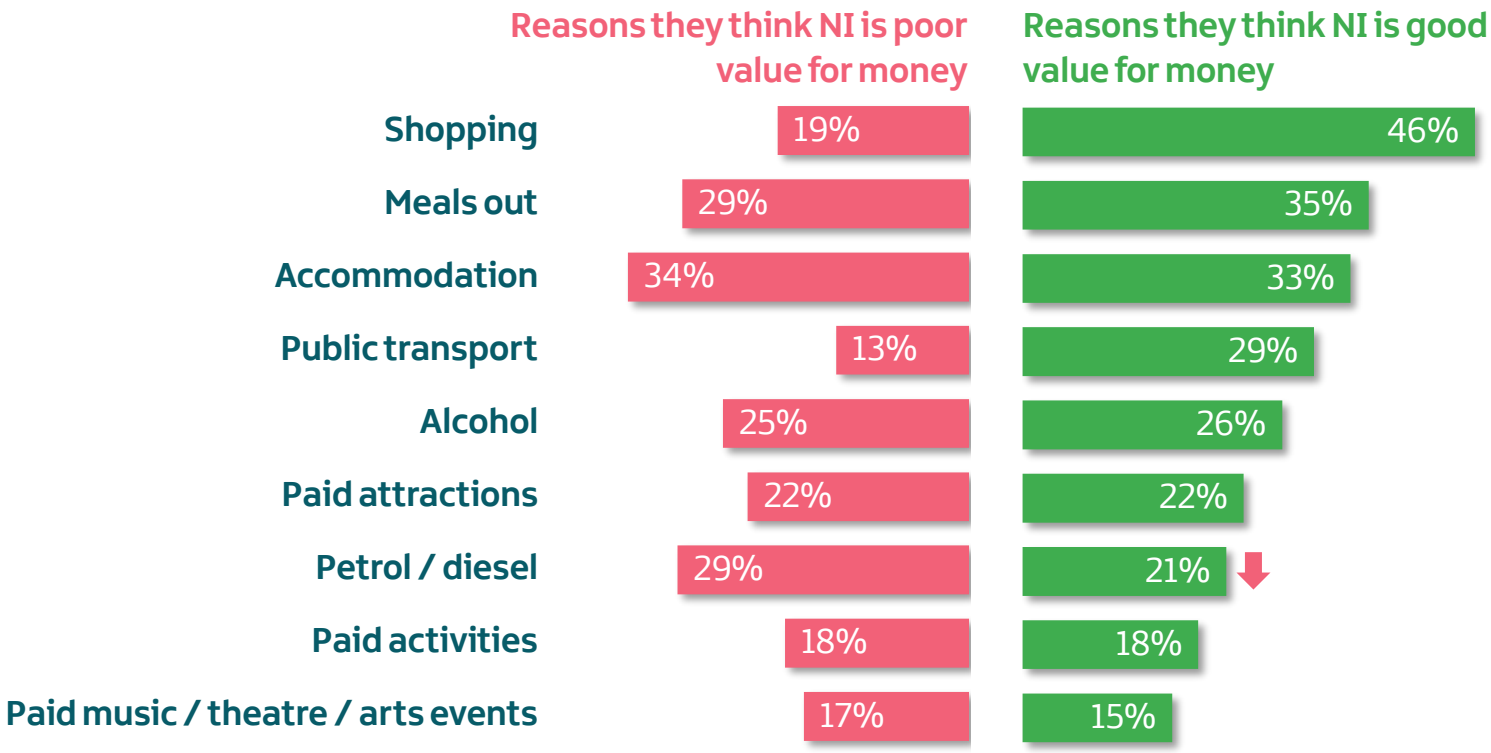
N = 750

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

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Shopping remains a clear value-for-money strength, while perceptions of petrol and diesel have declined

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)
Shopping	+26	+24	+27
Meals out	+6	+7	+13
Accommodation	-1	+1	0
Public transport	+16	+15	+16
Alcohol	+2	+5	+8
Paid attractions	0	0	+1
Petrol / diesel	-9	+1	+6
Paid activities	-1	-5	-1
Paid music / theatre / arts events	-1	0	-5

sig. higher / lower than prev. wave

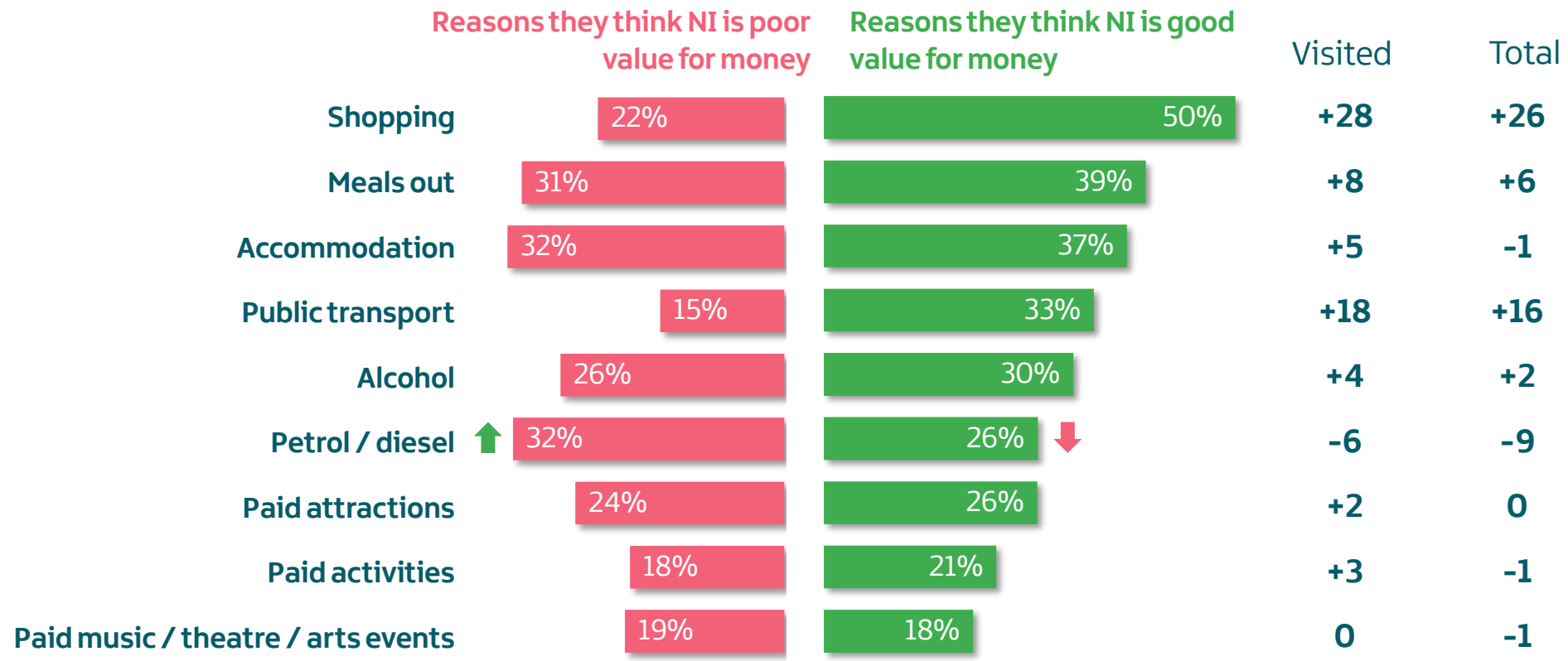
N = 750

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?

TOURISM NORTHERN IRELAND

Among those who visited, value-for-money perceptions of petrol and diesel have declined significantly

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



Total N = 750, Those who took any trip in NI = 266

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 pressures remain the biggest barrier to visiting NI, although weather/ similarity to ROI grows as an obstacle

Barriers to visiting NI



35-54s are significantly more likely to feel cost of living increases are a barrier to visiting (53%)

N = 750

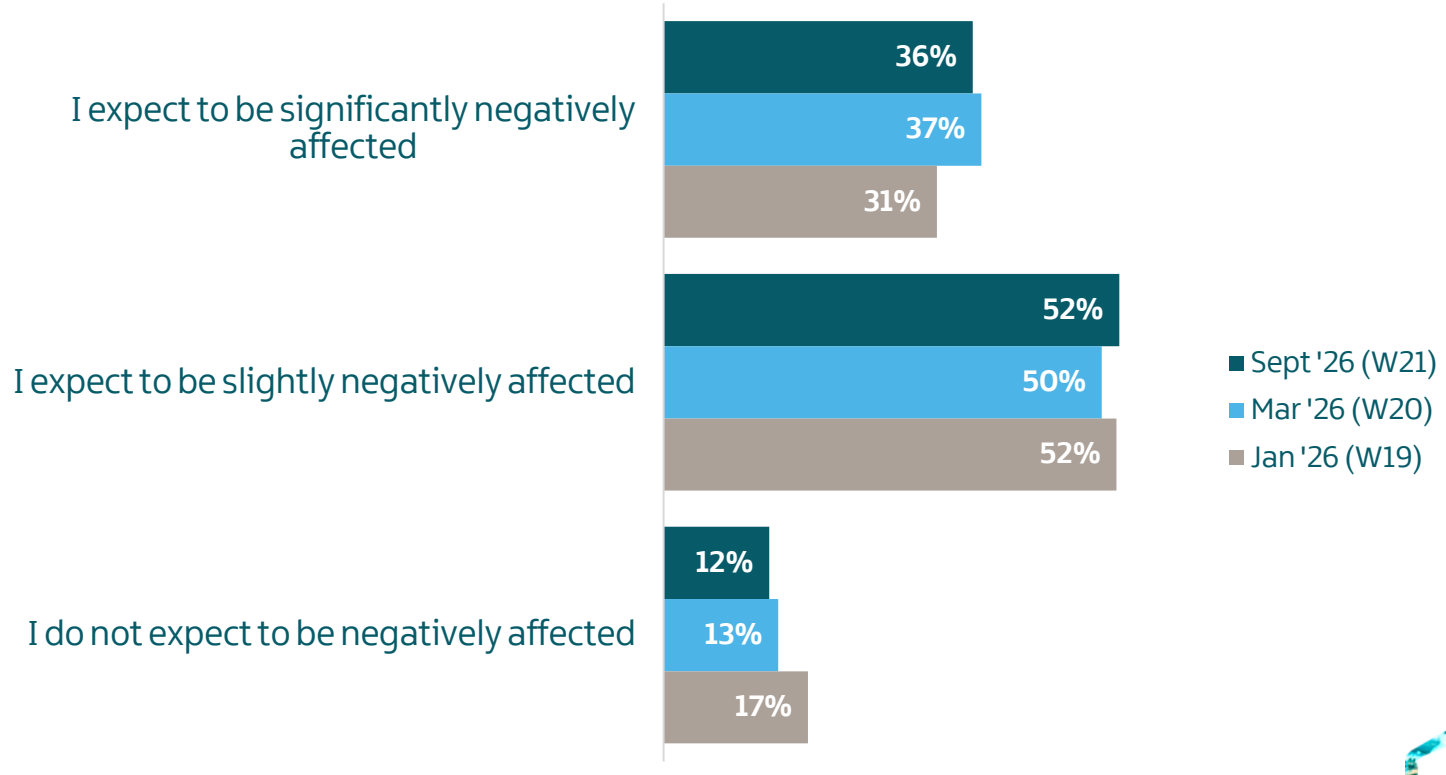
FO. Which, if any, of the following factors do you see as potential barriers to you taking a short break or holiday in Northern Ireland in the next six months?

TOURISM NORTHERN IRELAND

Cost-of-living pressures remain a widespread concern, with nearly nine in ten expecting to be affected

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

88%
expect to be affected by cost-of-living increases



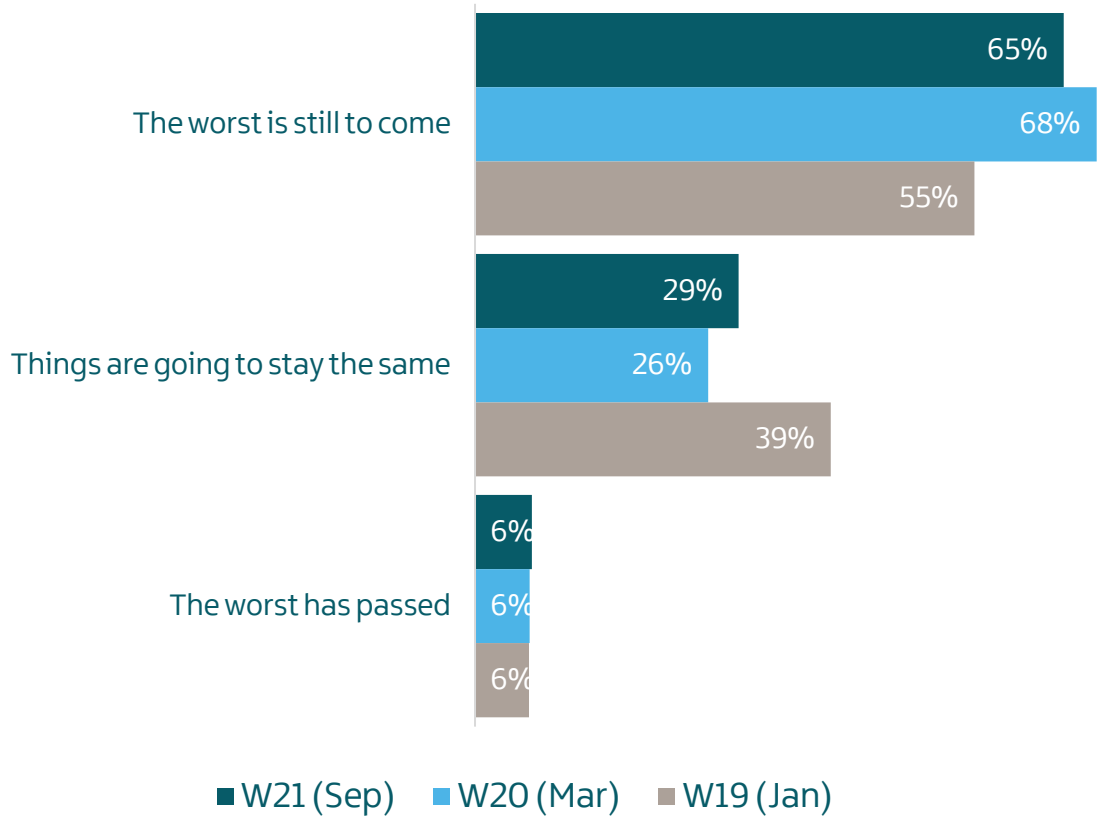
N = 750

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

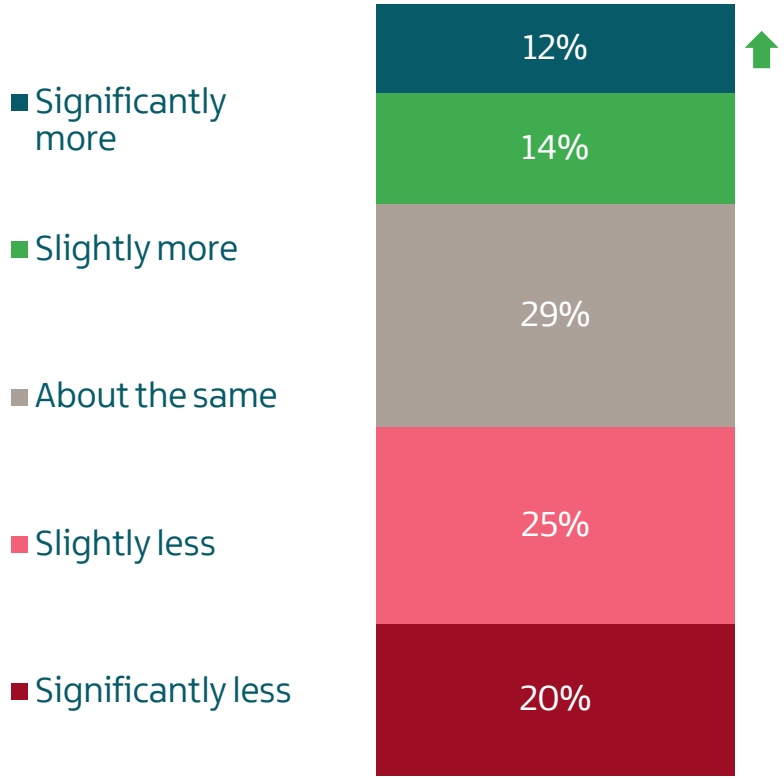
TOURISM NORTHERN IRELAND

Cost-of-living expectations broadly stable vs. March, although disposable income does improve somewhat

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



How disposable income to spend on activities / holidays has changed



N = 750

sig. higher / lower than prev. wave

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?



Summary

TOURISM NORTHERN IRELAND

Summary

Positive visitor experiences reinforce NI's appeal

ROI visitors continue to have highly positive experiences in NI, with particularly strong perceptions of hospitality, food and drink, outdoor experiences and attractions. This provides a strong base for repeat visitation and positive recommendation.

Intentions to visit NI remain resilient

While day trip intentions are down, demand for short and long breaks in NI is largely stable, with some consumers substituting longer-haul travel with trips closer to home. There is opportunity to convert consideration into visits by focusing on key motivators, particularly relaxation and escapism. Highlighting popular experiences consumers are seeking around food and drink, opportunities to experience local and iconic attractions as well as connecting with the outdoors, could help deliver for NI.

Strong value supports resilience despite cost pressures

Although household budgets remain under pressure, consumers remain committed to taking holidays. NI continues to be perceived as offering good value for money, helping it remain competitive within a challenging economic environment. Maintaining a strong value proposition remains important to continue attracting ROI visitors.