Tourism Northern Ireland Consumer Sentiment Research

NI Market – Wave 15

October 2024

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Research background

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Research background & objectives

This is the 15th wave of our consumer sentiment barometer for Northern Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how things have changed throughout 2024 and into 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

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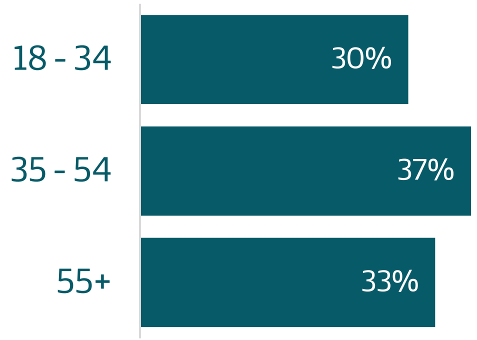
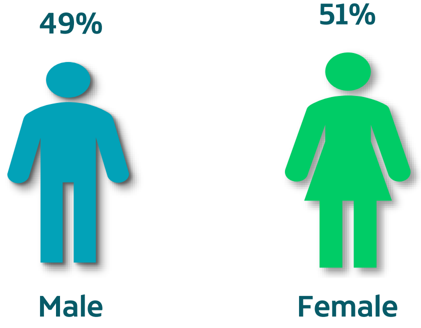
Sample – We spoke to a robust, nationally representative sample in Northern Ireland

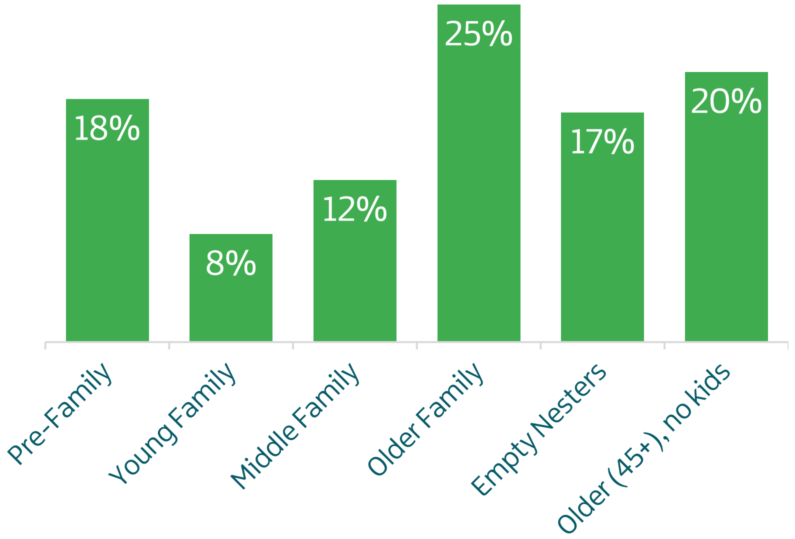
Age



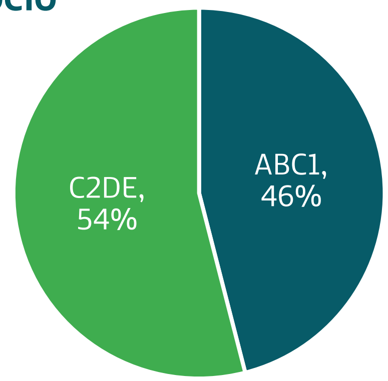
Gender



Lifestage



Socio



Region

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Fieldwork was conducted between 14.09.24 and 25.09.24

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Travel experiences

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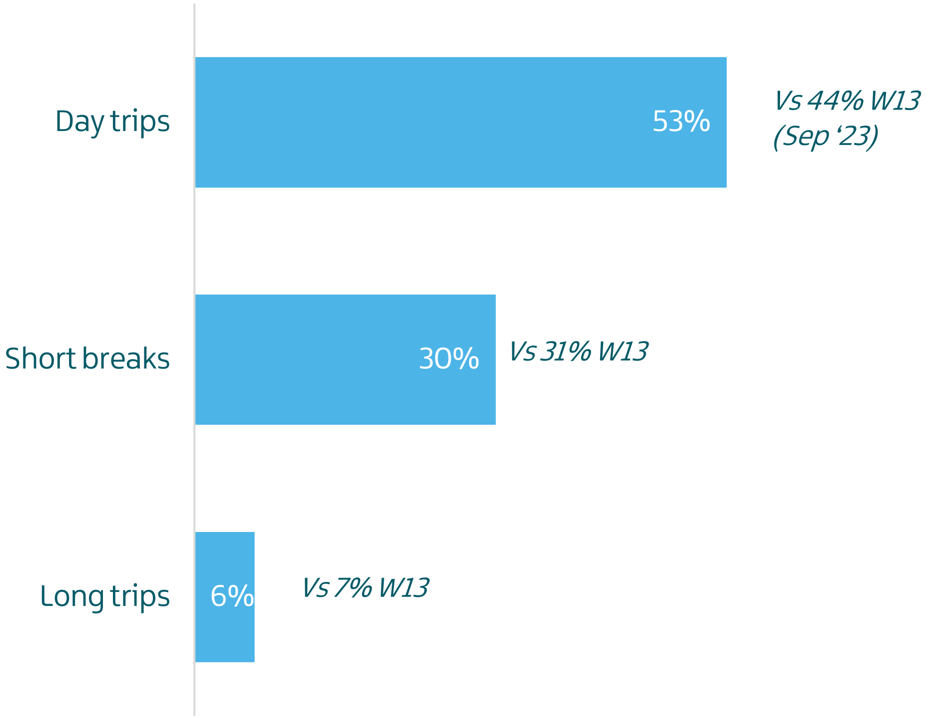
Increase in day trips in NI as well as trips abroad vs. this time last year

31%

have taken a **short or long break in** NI in 2024

Wave 11 (Sept 2023): 33%

% of total sample who took a trip in NI



Other than NI…

36% took a break in ROI
Vs 34% in W13

48% went abroad
Vs 28% in W13

25% didn't travel at all
Vs 24% in W13

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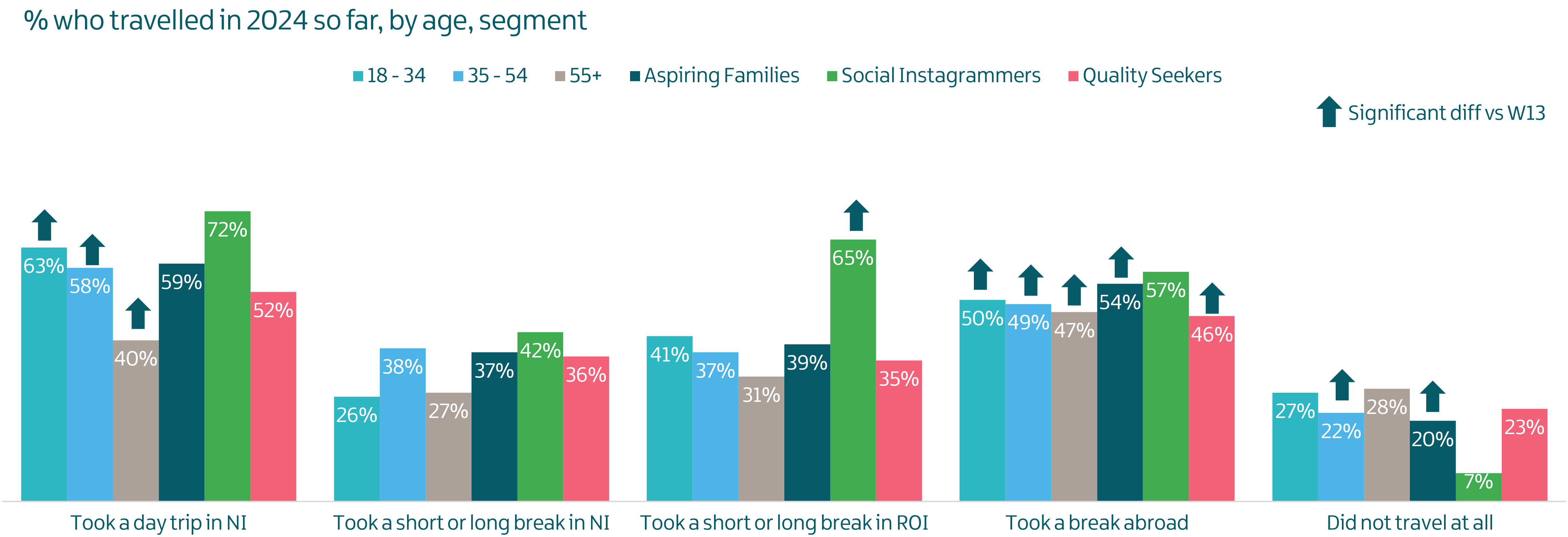
N = 400

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 2024?

Younger age groups more likely to have travelled abroad



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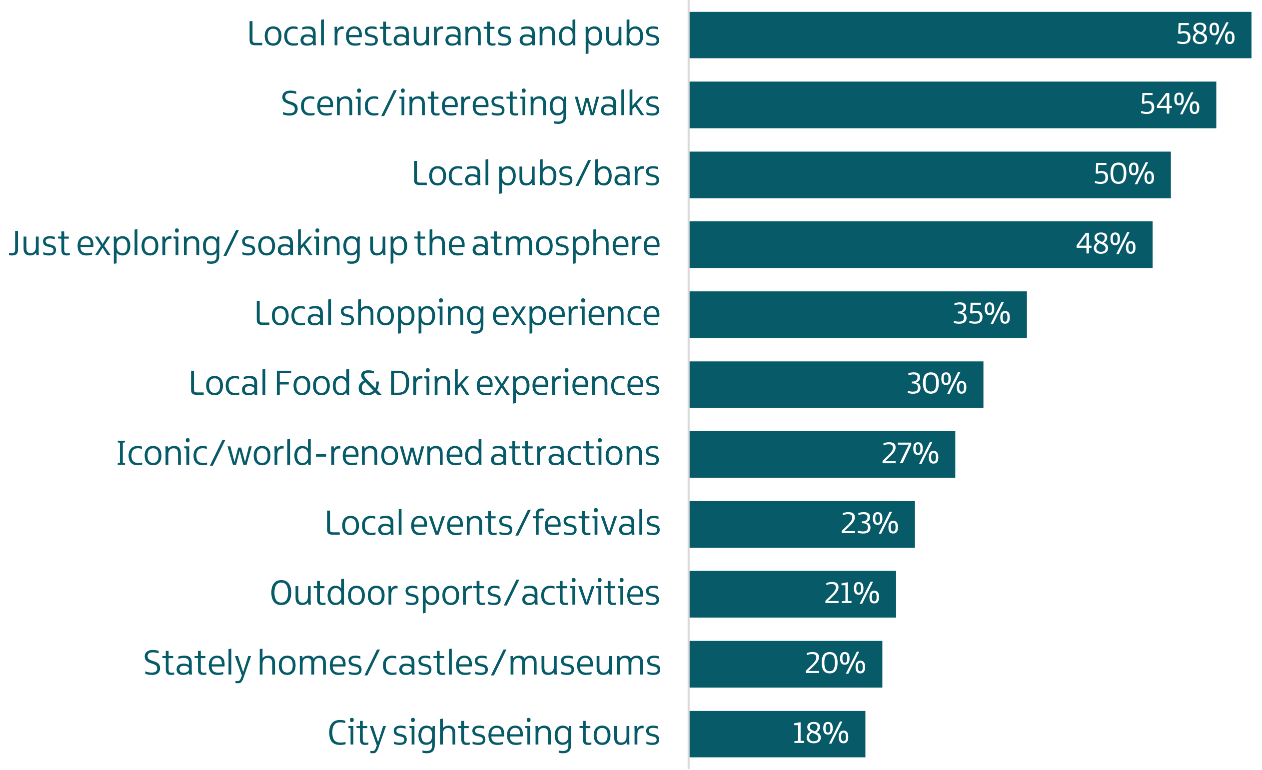
N = 400

D1a. Have you taken a day trip, short break, or long trip in the Republic of Ireland, Northern Ireland or abroad for leisure purposes since the start of January 2024?

As well as food & drink, plenty of people going on walks/ soaking up the atmosphere on their trips

What they did / experienced in NI in 2024



18-34s more likely to have visited the local Food & Drink experiences (40%)

Women more likely to have gone shopping (44%)

Those on day trips more likely to have attended local events/festivals (26%)

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N = 244 who took a short or long break in NI 2024

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

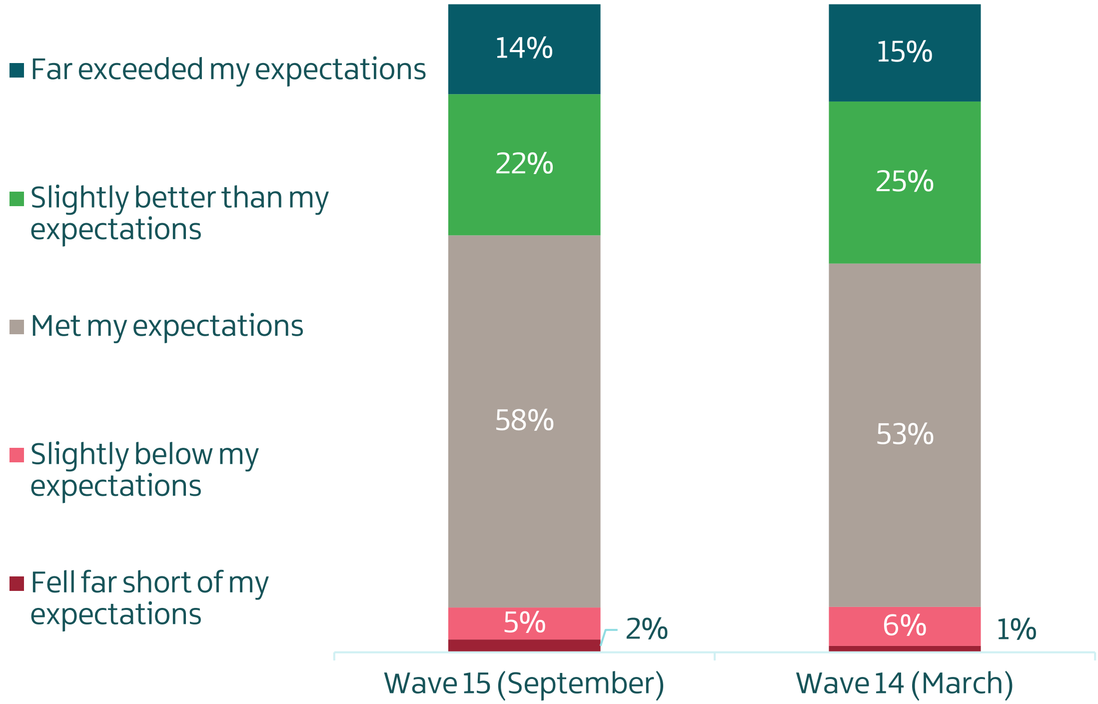
People's expectations continuing to be met

93%

had their expectations met or exceeded

Vs 93% in Wave 14 (March)

Those who visited NI felt their trip...



N = 123 (break in NI since 2024)

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

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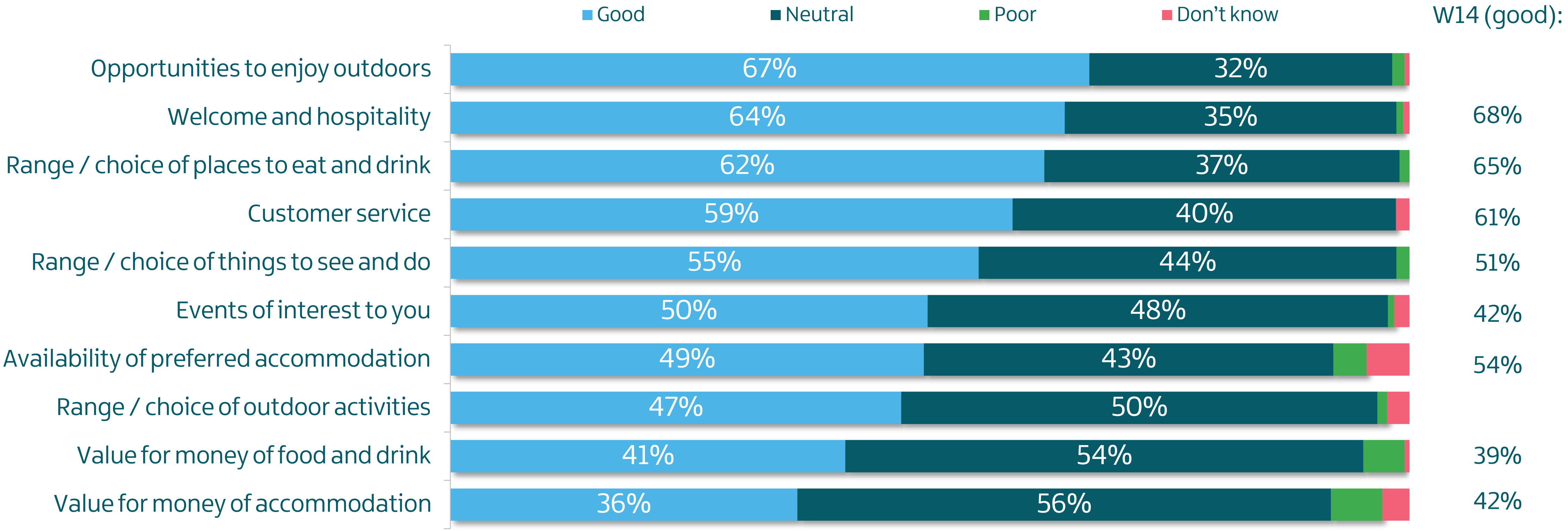
Slight drops in satisfaction with welcome / range of things to see and do as well as VFM of accommodation

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



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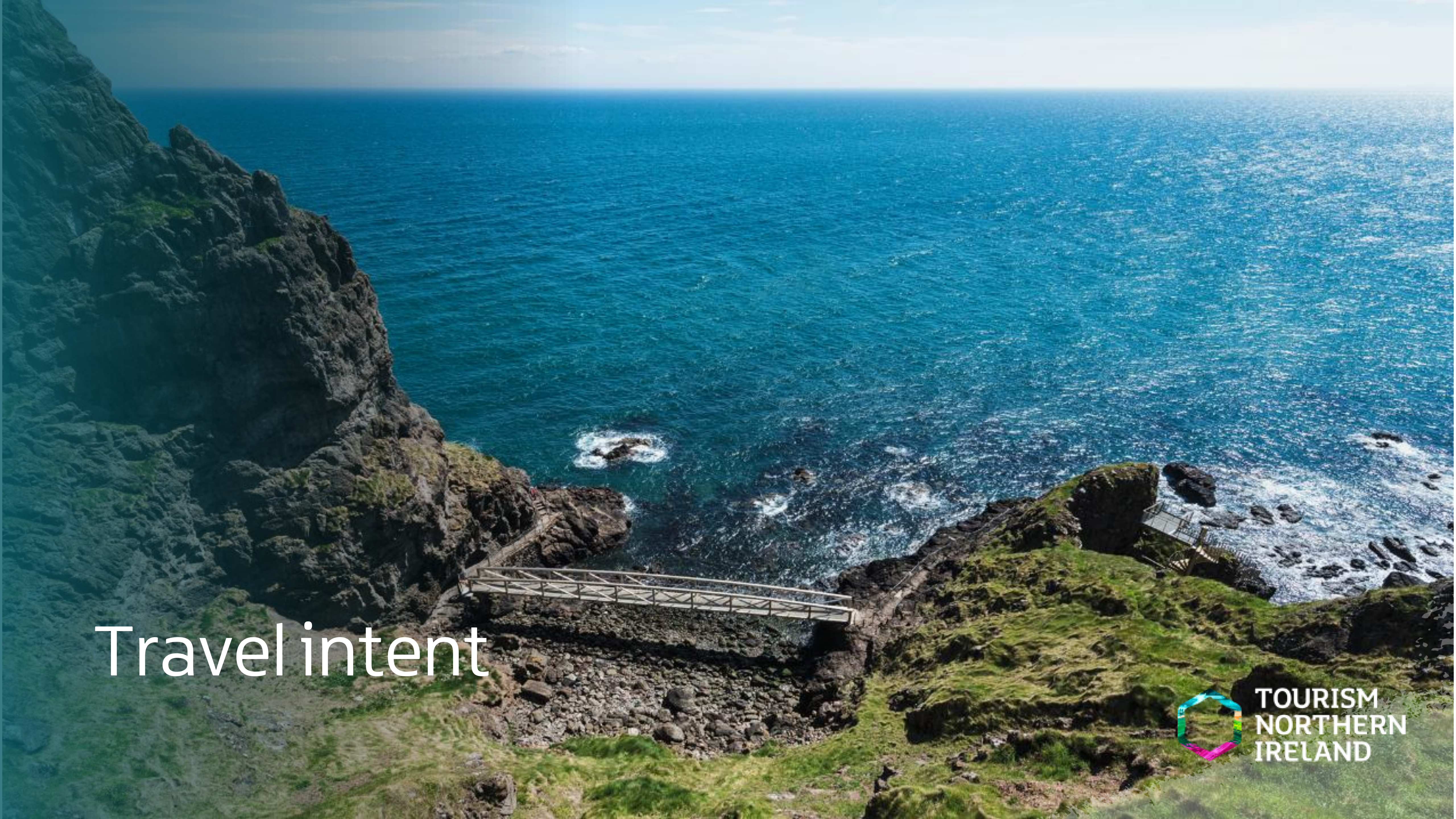
N = 302 (break in NI since 2023)

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



Travel intent

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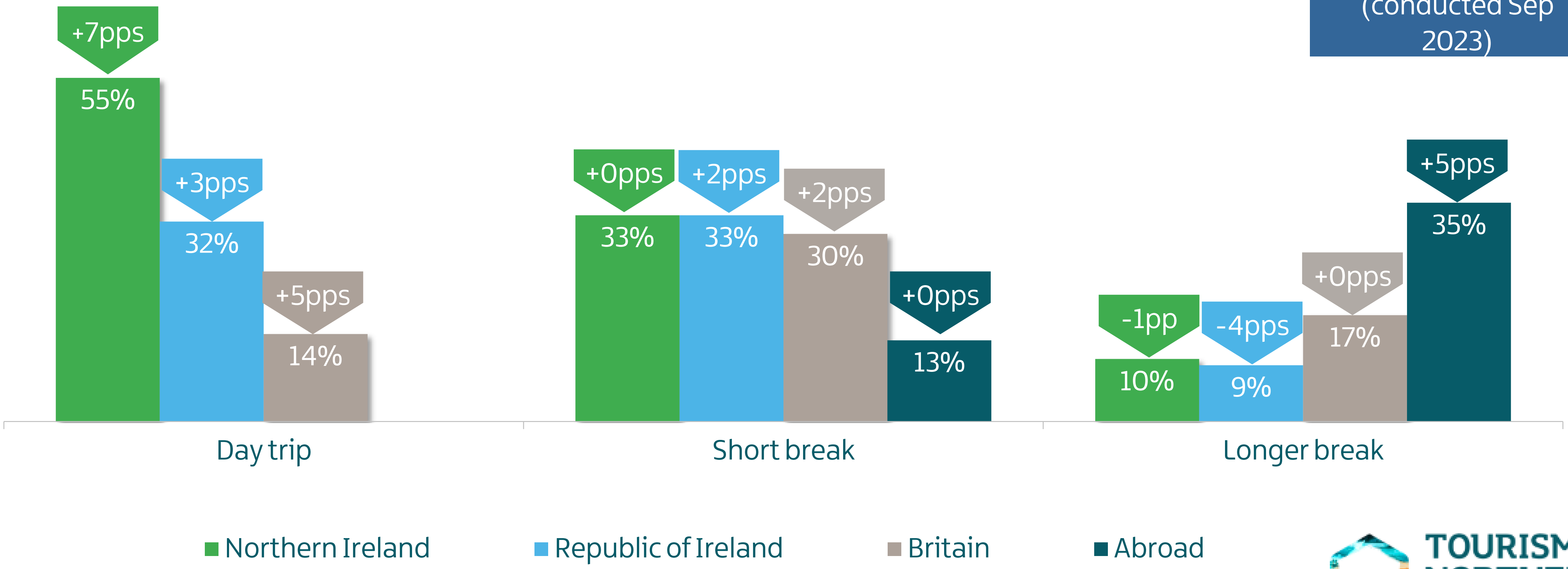
NI day trip intentions are up compared to last year as are long trips abroad – minor or no decreases elsewhere

Intentions of taking a break **in the remainder of 2024**

Wave 15 vs Wave 13 (conducted Sep 2023)



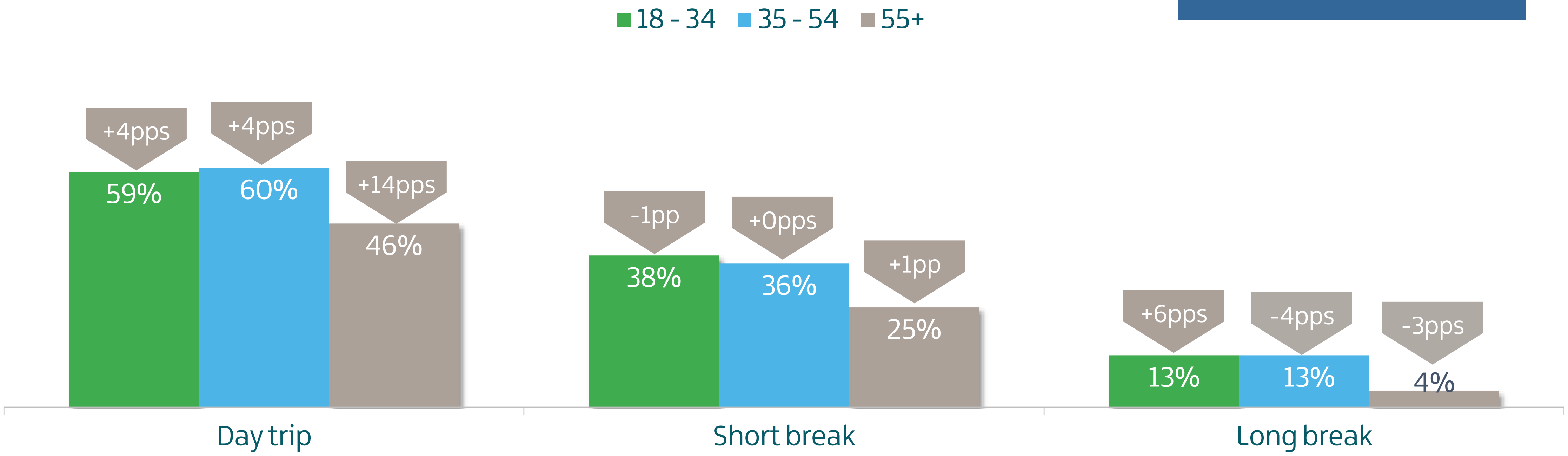
N = 400

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

NI day trip intentions up especially among over-55s; long breaks down except for 18-34s. No change in short breaks

Trip intentions of taking a break in **NI** in **remainder of 2024**

Wave 15 vs Wave 13



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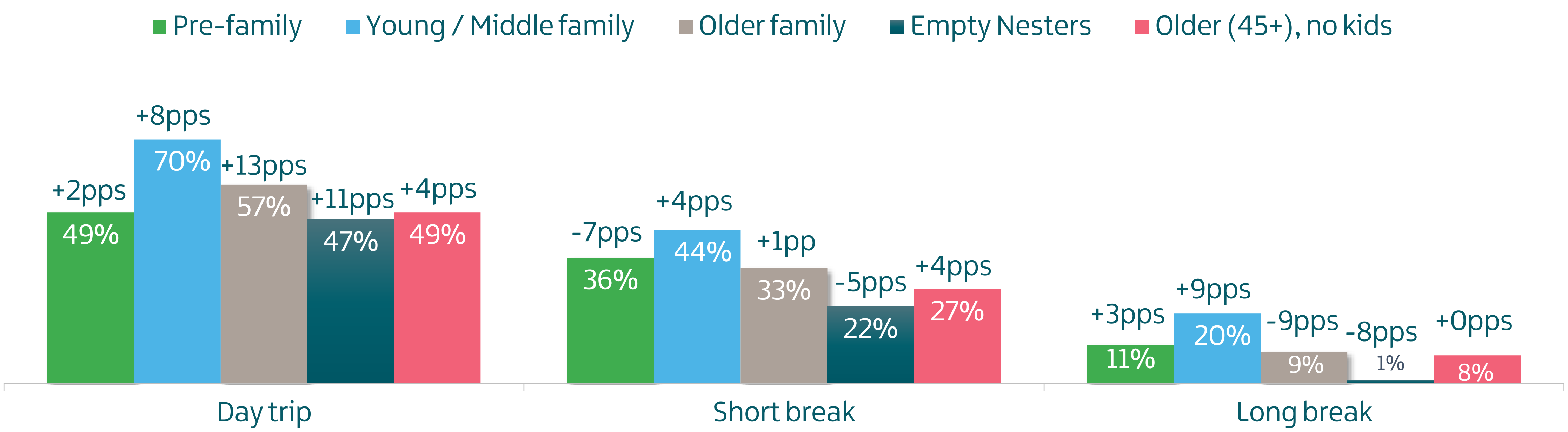
N = 18 – 34 (120) 35 – 54 (148) 55+ (132)

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 (September to December)?

Again, increases for all on intended day trip - young/middle families up on all types of trips

Trip intentions of taking a break in **NI** in remainder 2024

Wave 15 vs Wave 13



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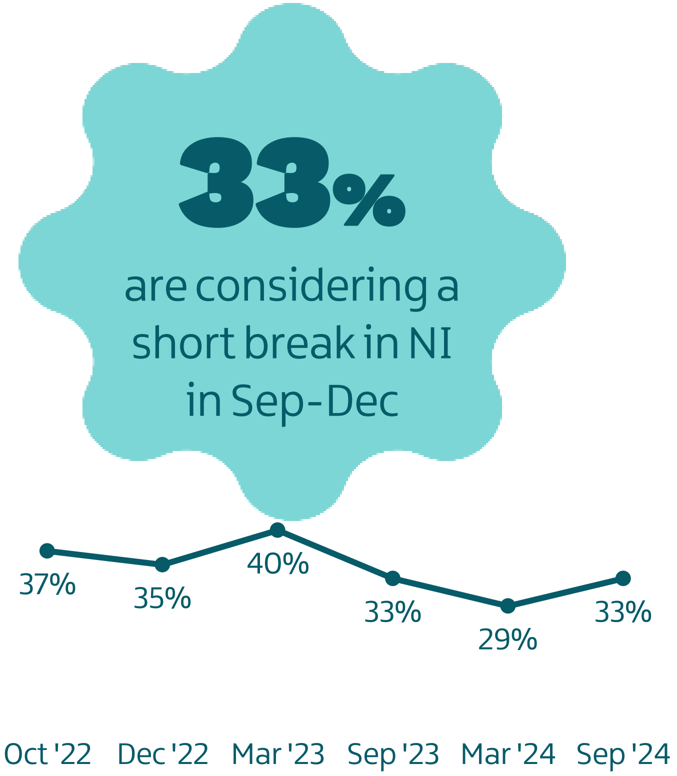
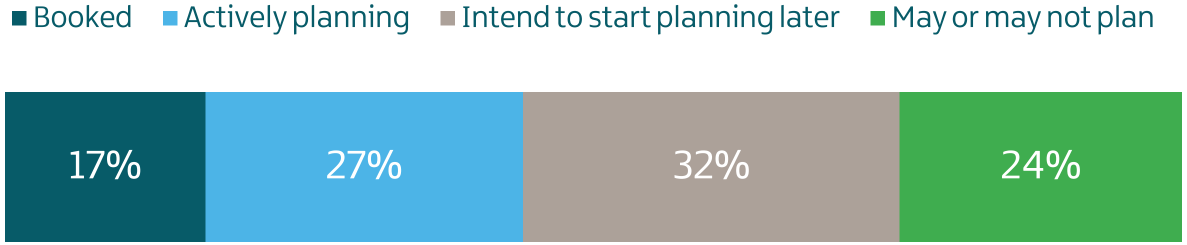
N = 76 (Pre), 90 (Young/Mid), 94 (Older), 57 (Empty Nesters), 82 (Older, no kids)

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 (Oct - Dec)?

NI short break intentions stable - 1 in 3 planning a short break in 2024, same as this time last year



Status of short break – have they booked?



44% are actively planning or have booked a trip in NI – **12%** of the total sample

Short break planned for

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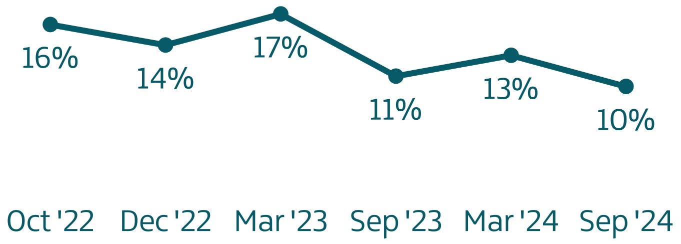
N = 400 / 131 considering short break / 100 planning a short break

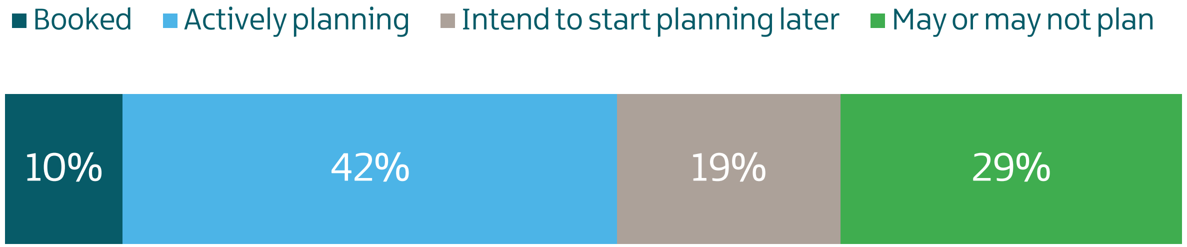
E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (September to December)? / E2. Which specific month, if any, did you have in mind for your break(s) in Northern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

NI long trips trending downwards but over half booked or are actively planning their trip in the end of 2024

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

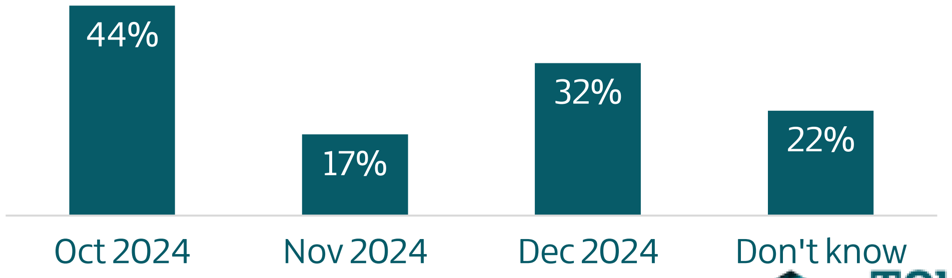


Status of long break – have they booked?



52% are actively planning or have booked a trip in NI – **5%** of the total sample

Long break planned for



N = 400 / 41 considering long break / 29 planning long break

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

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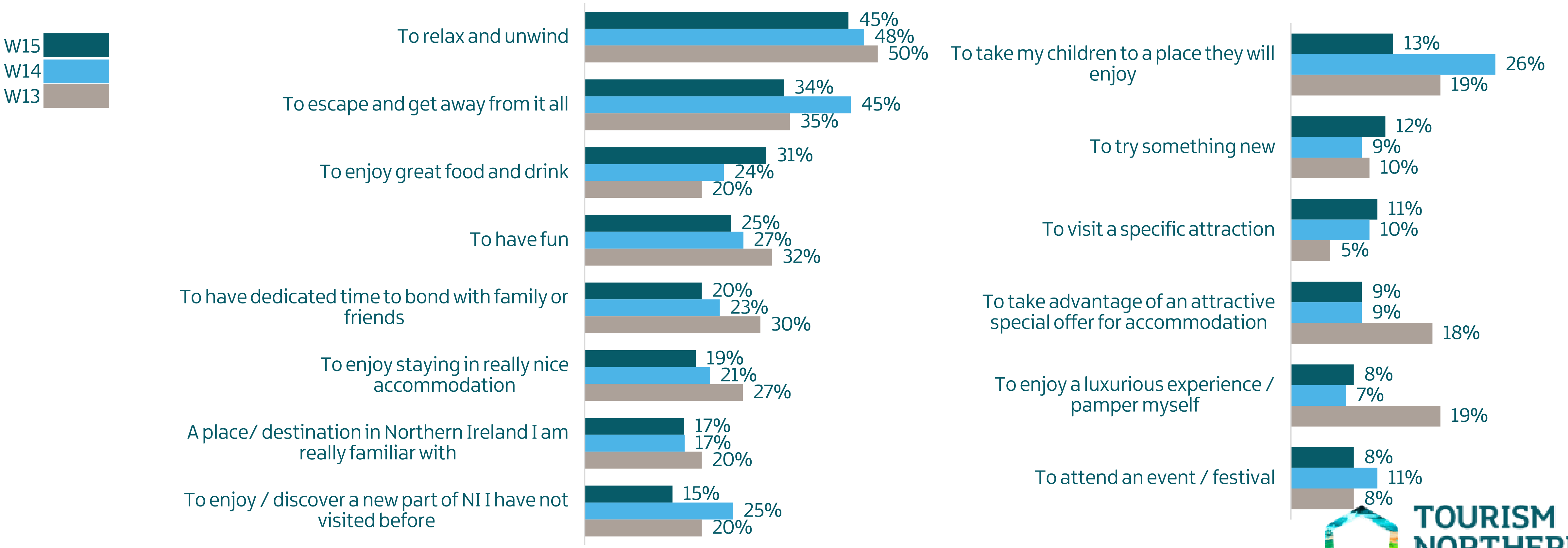
Escapism dropping back while enjoyment of food and drink and visiting specific attractions on the rise

Trip motivations (long and short combined)



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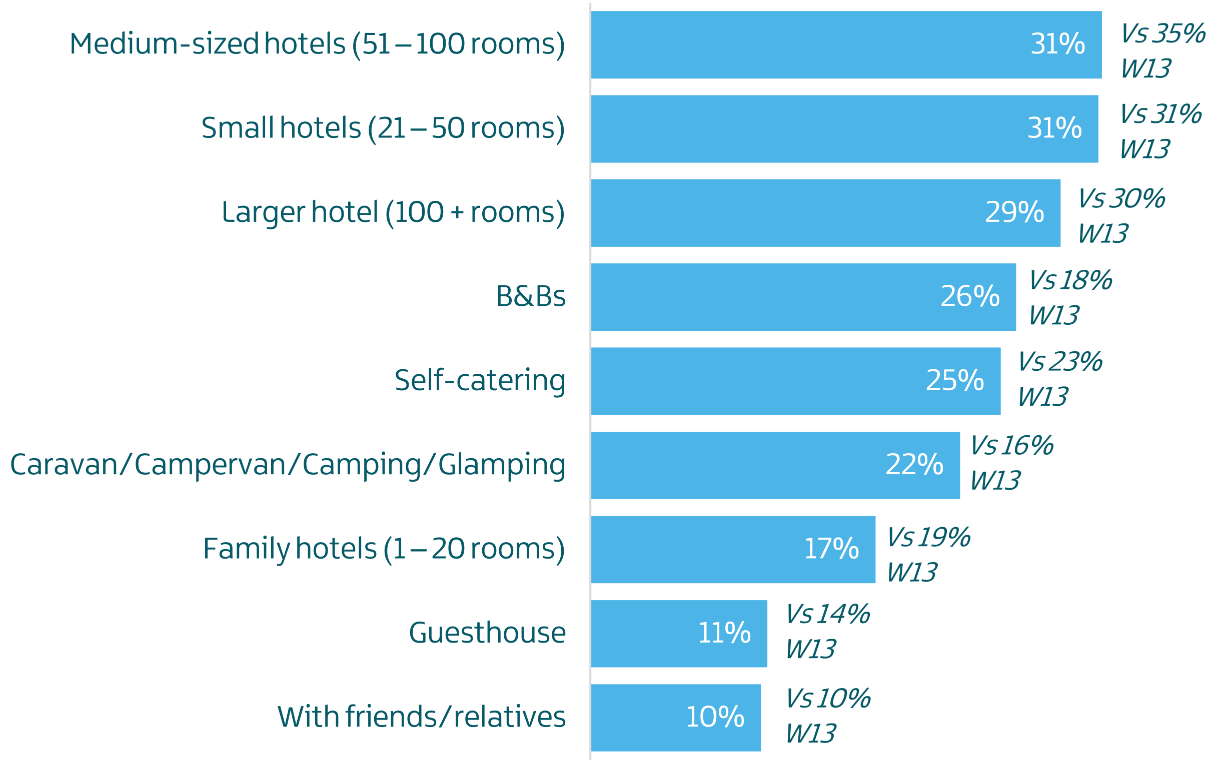
N = 107 planning long or short break (excl. "may or may not plan")

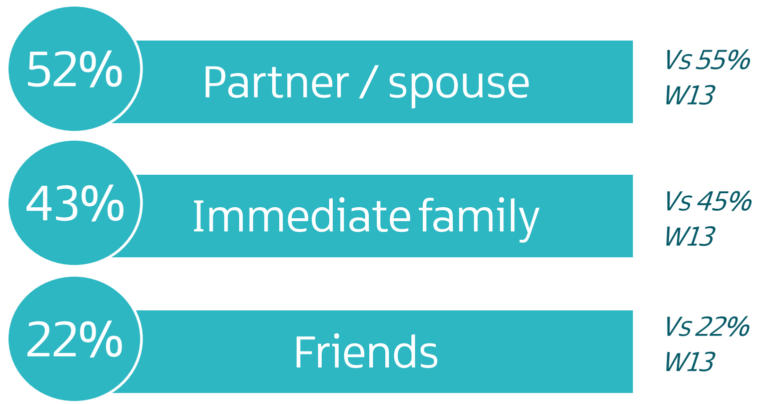
E4a. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the trip?

Preference for B&Bs and Caravan/Camping, etc. higher than this time last year

Where staying (combined; *showing 10% or higher*)



Who travelling with (long & short combined)



N = 107 planning long or short break (excl. “may or may not plan”)

E5. Who do you intend on travelling/sharing your holiday(s) with? / E7. Thinking about your upcoming break(s) in Northern Ireland, what type of accommodation do you expect to stay in?

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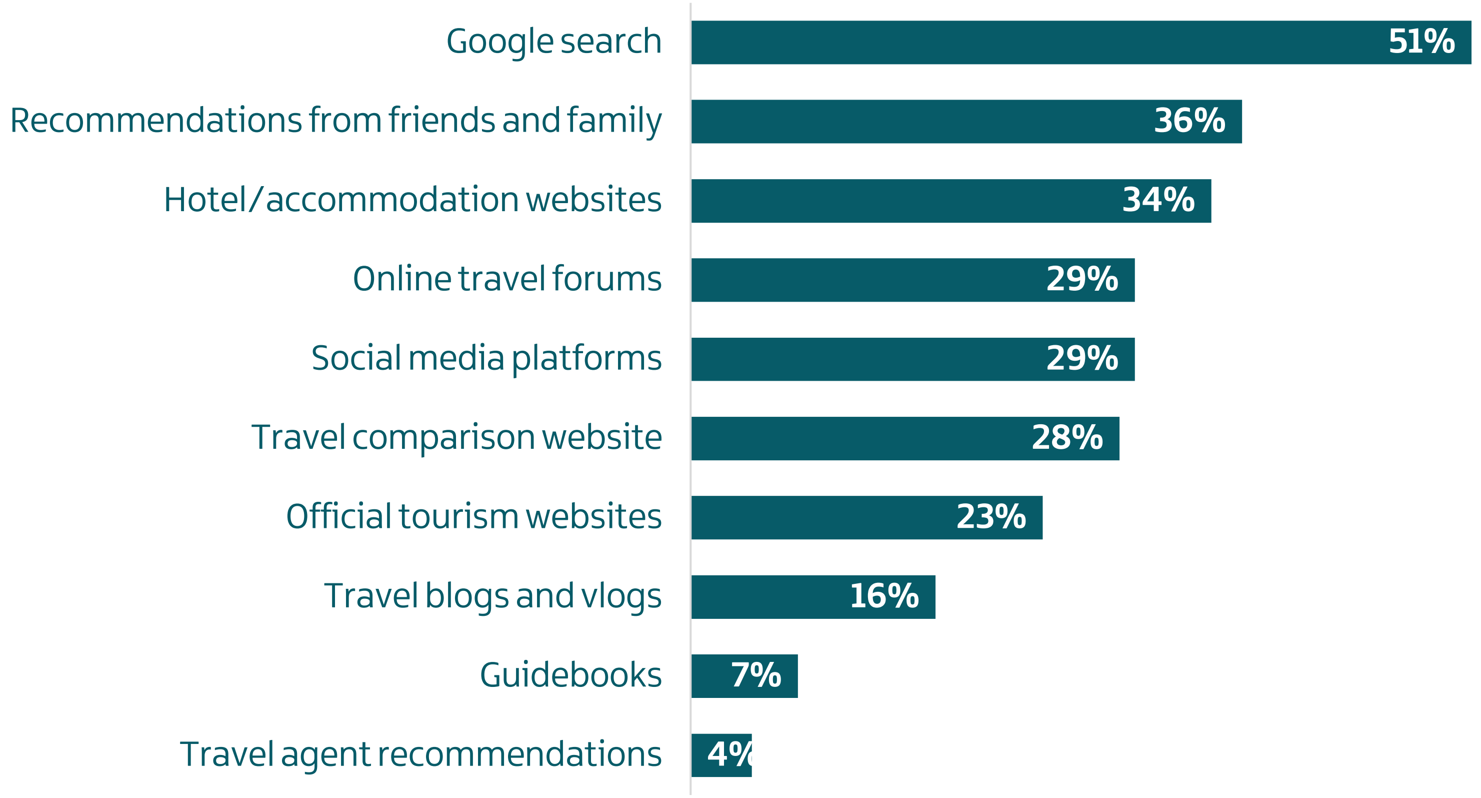
Accommodation websites and recommendations are the main way to research trips after googling

How they plan to research their trip



Booking.com the main choice of comparison site – 69% doing research via this site. 19% are doing research via Expedia

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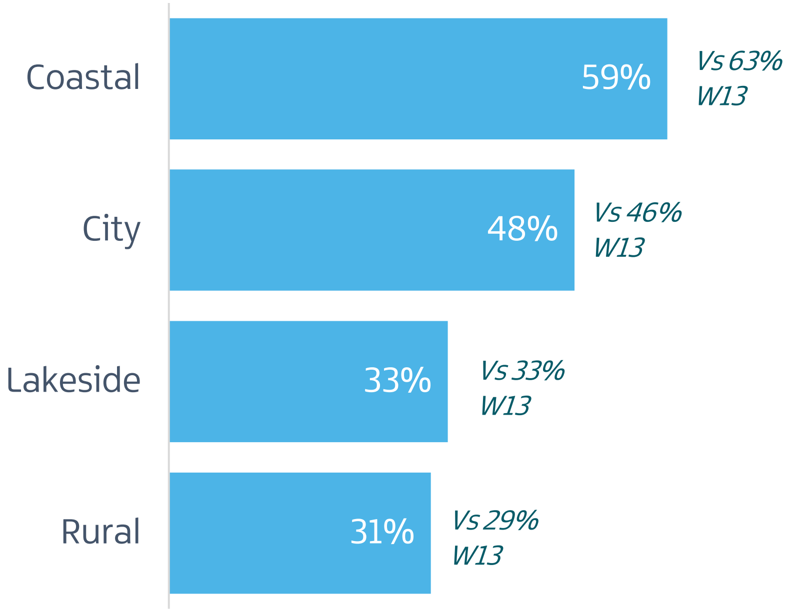
N = 107 planning long or short break (excl. "may or may not plan")

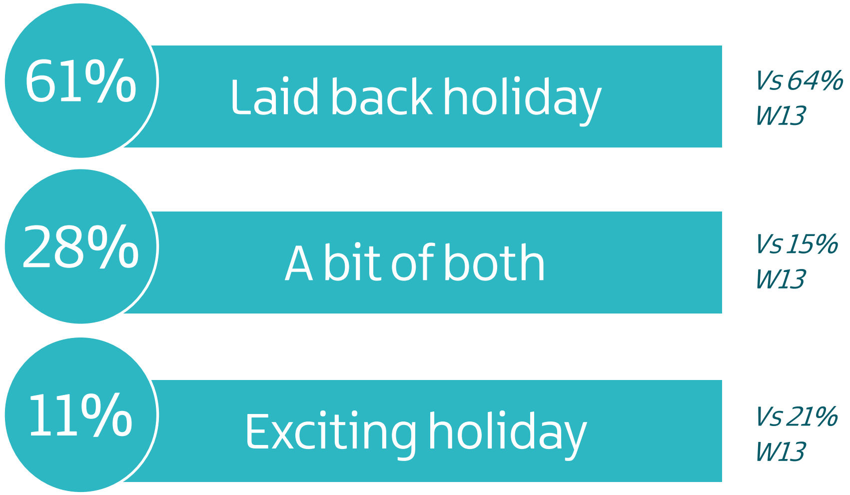
E10. And where do you plan to research accommodation, activities, travel, etc. for your upcoming trip in Northern Ireland? / E10b. You mentioned you plan to use a travel comparison website to research your upcoming trip in Northern Ireland. Which website do you plan to use?

Half as many looking for an exciting holiday vs this time last year – destination type broadly the same

Type of break preferred



Type of trip preferred

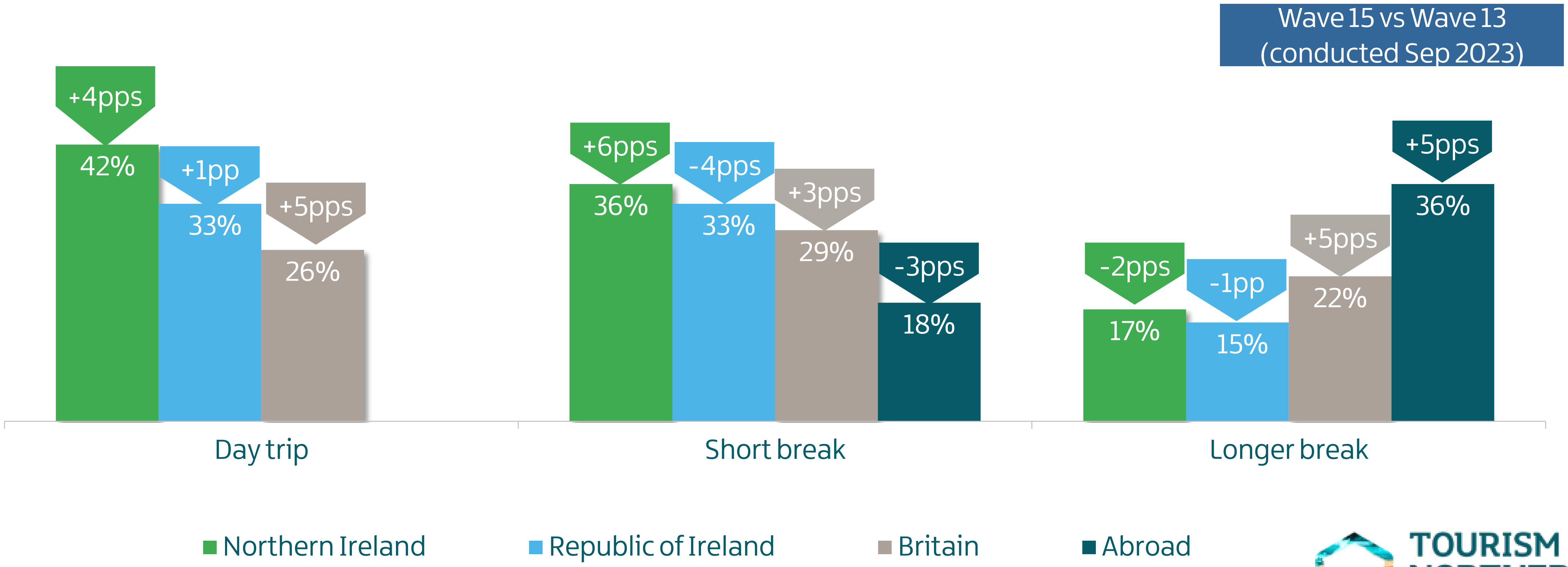


N = 107 planning long or short break (excl. "may or may not plan")

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?

Again, we see an increase in trip intentions, mainly for day trips and short breaks to NI or long breaks abroad

Intentions of taking a break **in early 2025**

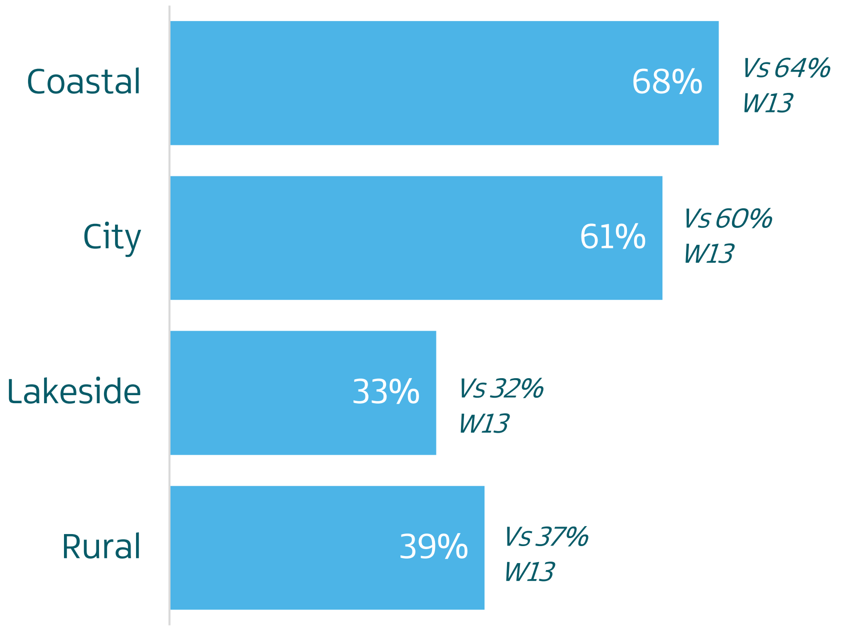


N = 400

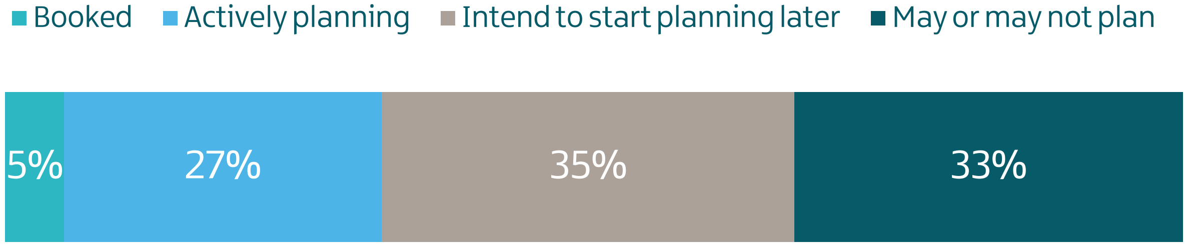
E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in winter/spring 2025 (Jan to April)?

1 in 3 are planning or have booked short breaks, even more for long breaks

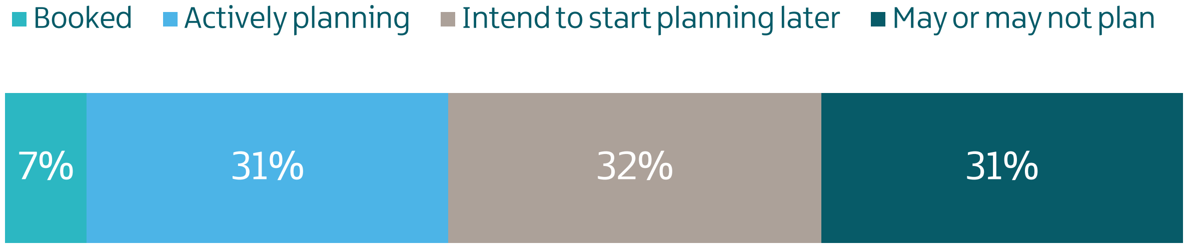
Type of break considered



Amount of short break planned



Amount of long break planned



N = 127 considering long or short break in early 2025

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

Affordability, range of things to see and do, family and friends all reasons to take another trip in NI

Reasons for revisiting NI

Convenience and affordability

- It's handy. It's near home.
- Close at hand and relaxing.
- Cheaper than going abroad.
- Good value for money.
- I just fancy a trip which won't cost too much.
- A staycation is good value for money.

Beauty / things to see and do

- The beauty of that region.
- Great atmosphere and local pubs.
- I love the beaches and seaside times.
- The shopping and the nightlife.
- Going to a show and staying overnight.
- Christmas shopping in Belfast.

Family and friends

- I enjoy taking trips in Northern Ireland with my family.
- I have been invited by extended family.

New Experiences and Exploration

- I want to see more parts of Northern Ireland I haven't experienced yet.
- There are always new and interesting places to discover. yet.

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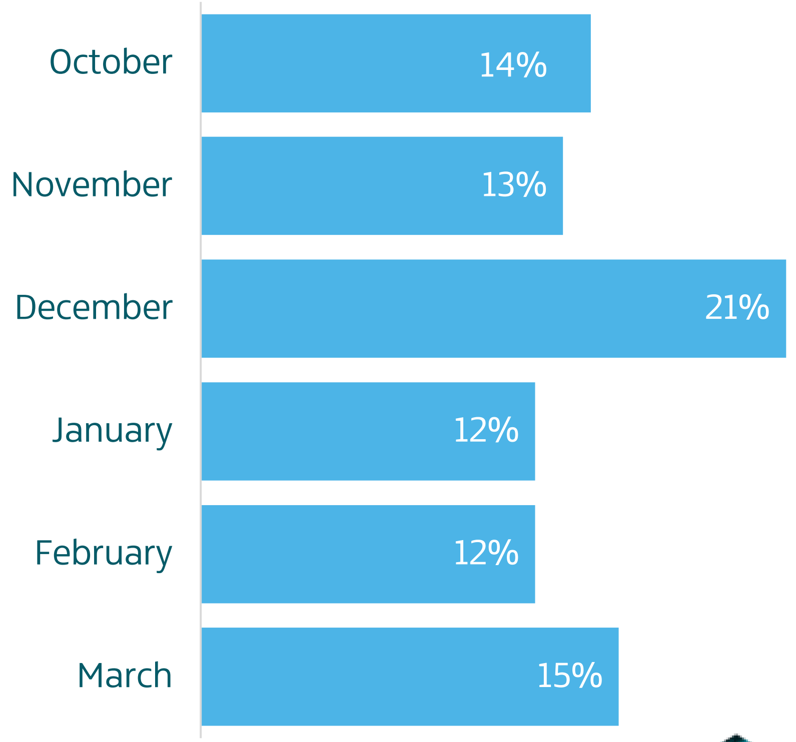
CB1. You mentioned you plan to take another trip in Northern Ireland in the next 6 months. What has prompted you to take another trip in Northern Ireland?

Number considering trips abroad in next 6 months stable – but number actively planning increases significantly

49% of total sample are considering a break abroad in the next 6 months *(vs. 48% W13)*

63% of this cohort are actively planning or have booked their trips *(vs. 54% W13)*

When trips abroad are planned for



N = 400 (total) / 194 considering trip abroad

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

Value for money

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Value for money drops for both ROI and NI – NI score still fairly strong compared to ROI and GB

Value for money perceptions

	Poor value for money	Good value for money	Net Score Sep '24 (W15)	Net Score Mar '24 (W14)	Net Score Sep '23 (W13)
Spain	7%	53%	+46	+50	+52
Portugal	8%	49%	+41	+42	+43
Italy	23%	29%	+6	+13	+2
Northern Ireland	26%	32%	+6	+10	+15
France	24%	23%	-1	-8	-9
Great Britain	32%	24%	-8	-13	-11
Republic of Ireland	49%	18%	-31	-23	-31

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

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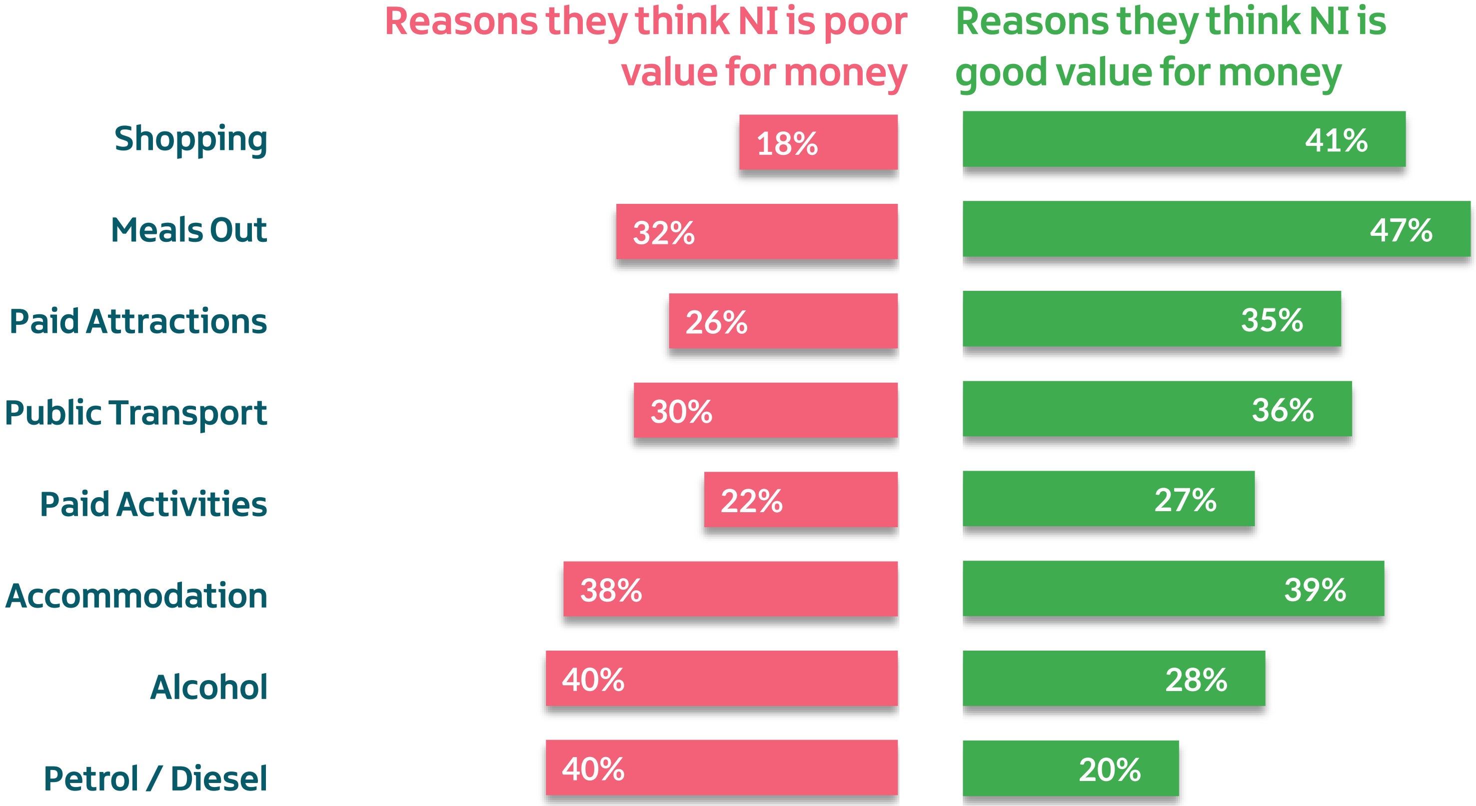
N = 400

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

Petrol / diesel net score made a slight comeback, shopping also up somewhat - most others taking a hit

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



Net score

	Sep '24	Mar '24	Sep '23
Shopping	+23%	+17%	+30%
Meals Out	+15%	+24%	+26%
Paid Attractions	+9%	+4%	+12%
Public Transport	+6%	+6%	+13%
Paid Activities	+1%	+4%	+2%
Accommodation	+1%	+12%	+14%
Alcohol	-12%	-7%	-8%
Petrol / Diesel	-20%	-34%	-6%

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

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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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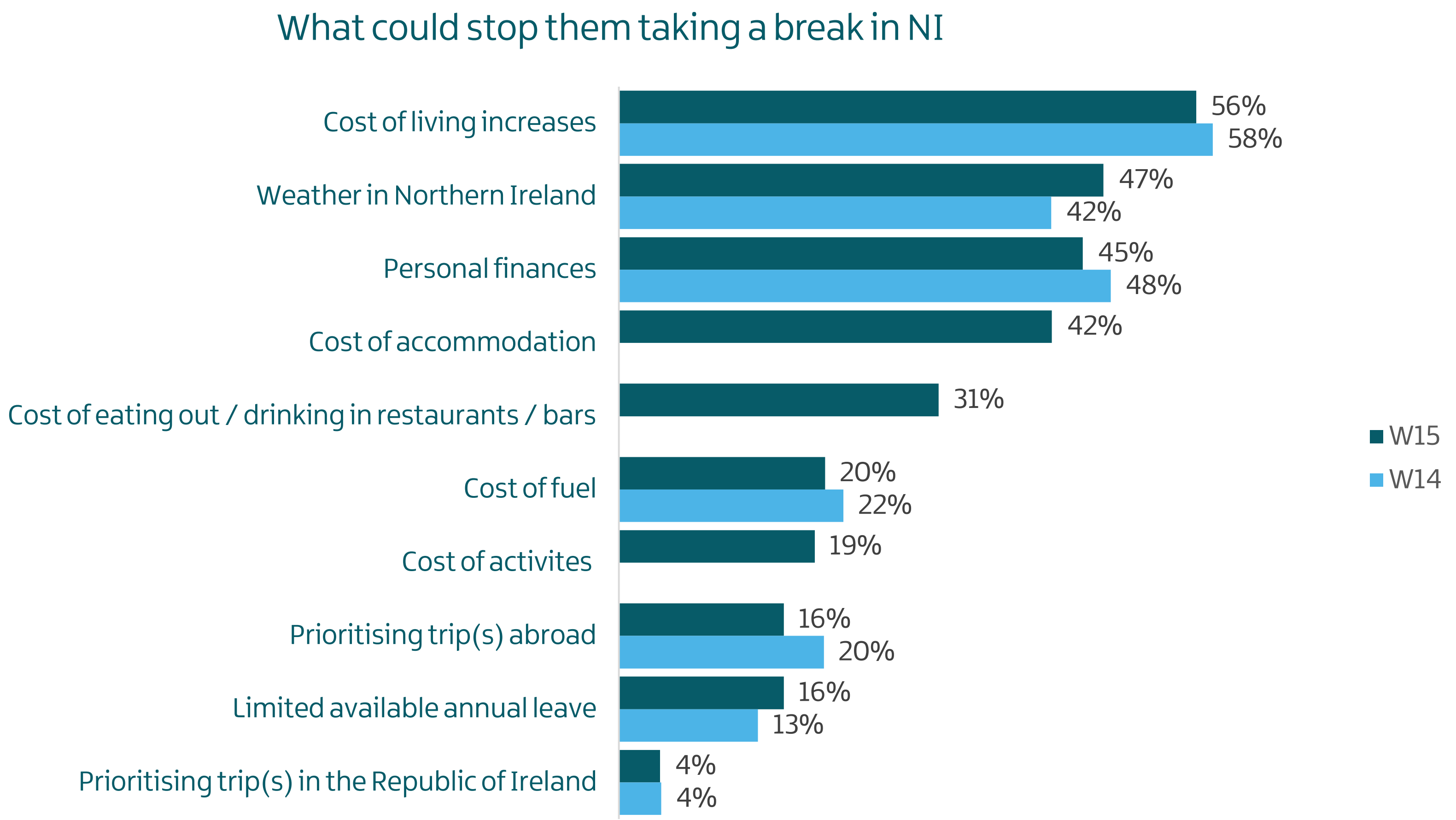
Cost of living and personal finances mentioned a bit less this time, people possibly getting used to prices



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N = 400

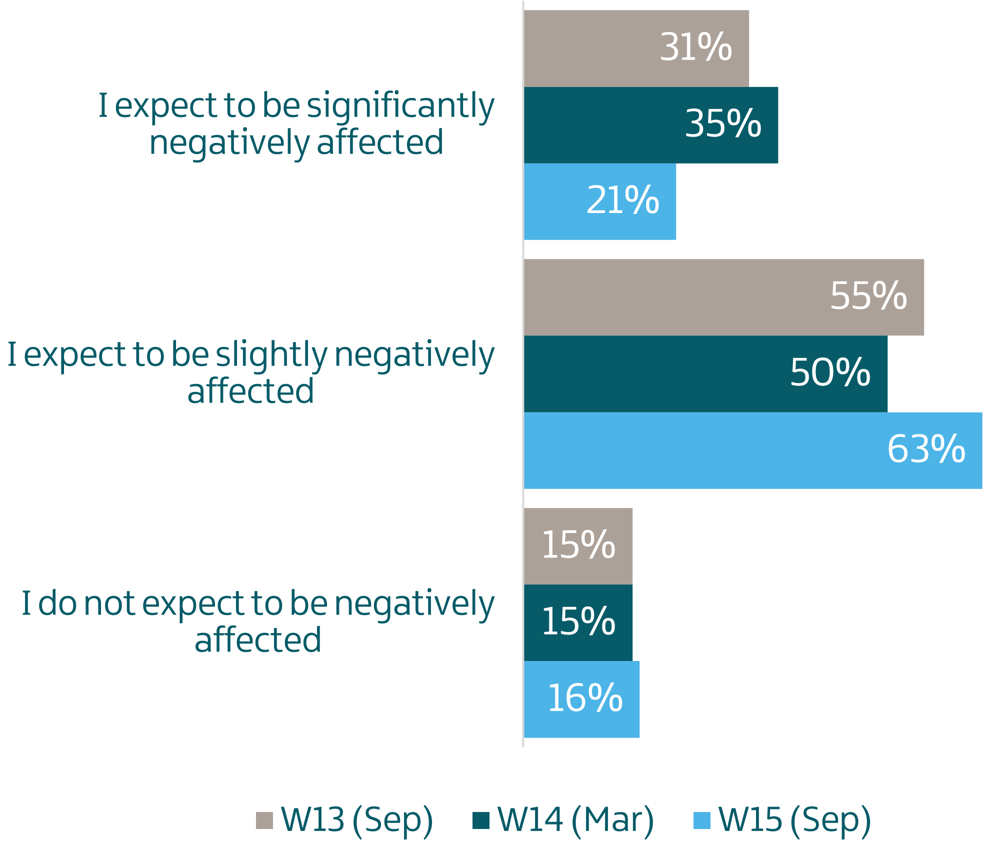
F0. Which, if any, of the following factors do you see as potential barriers to you taking a short break or holiday in Northern Ireland in the next six months?

A drop in the number expecting to be "significantly" affected by increases in cost of living

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?

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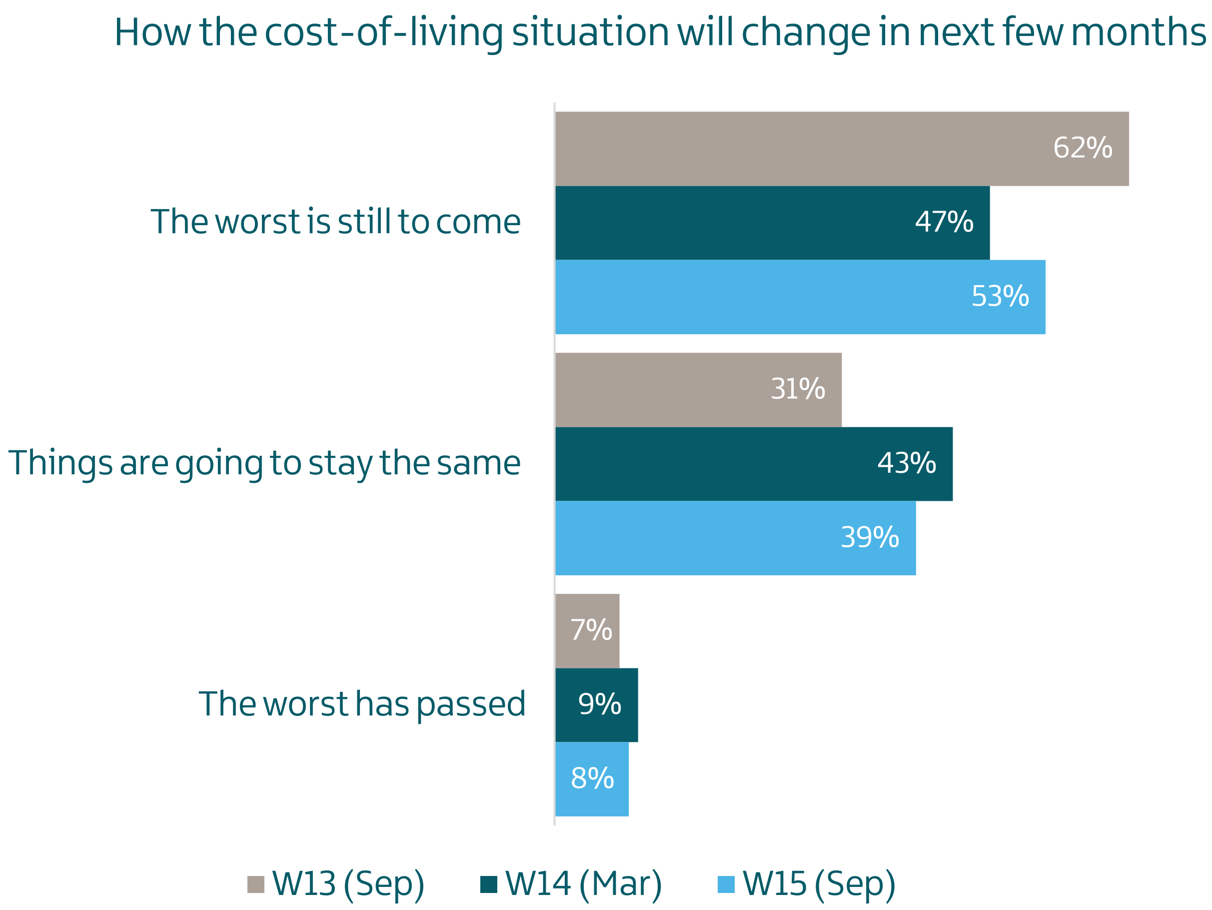
Over half believe the worst is still to come



N = 400

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

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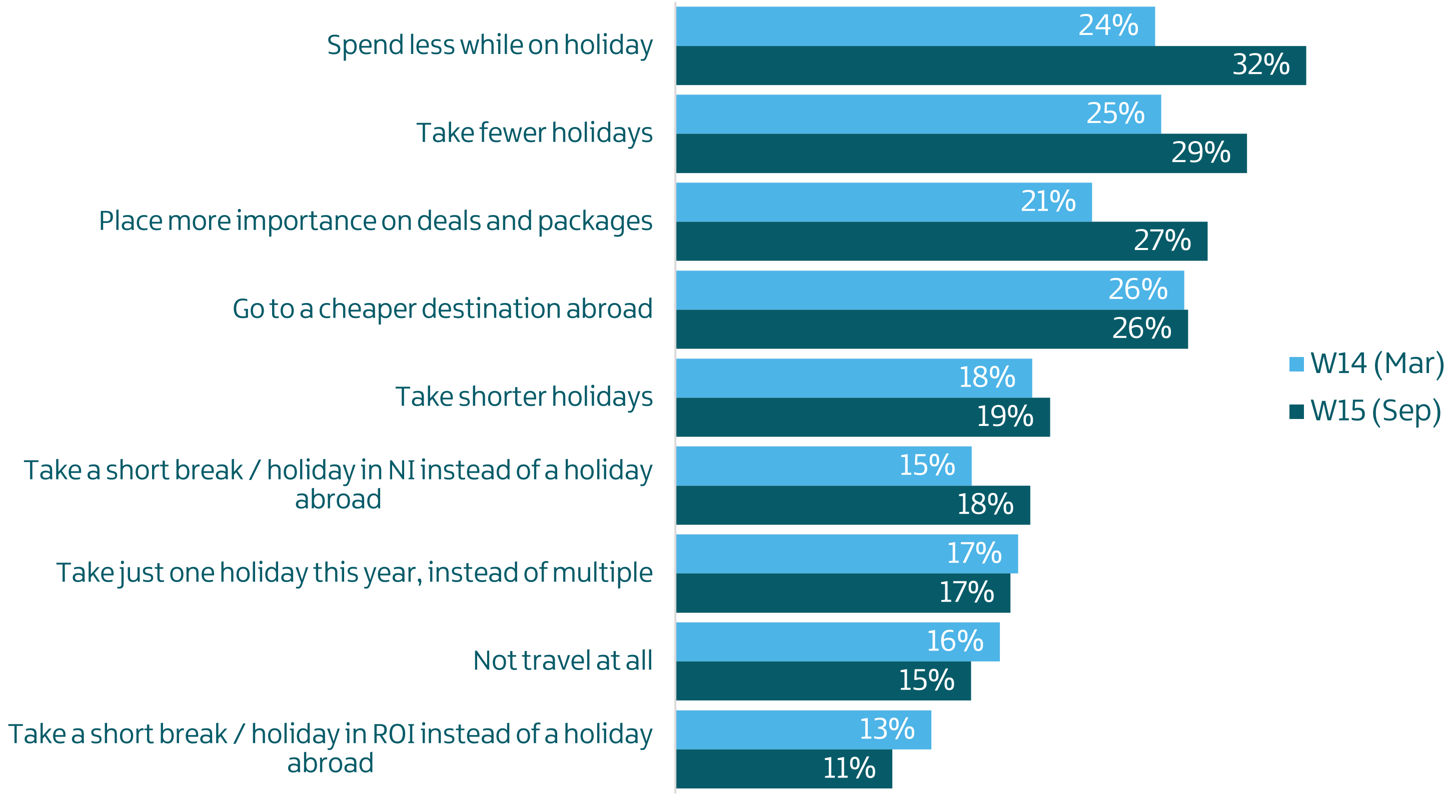
More desire to spend less while on holiday, take fewer holidays and look for deals and promotions

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



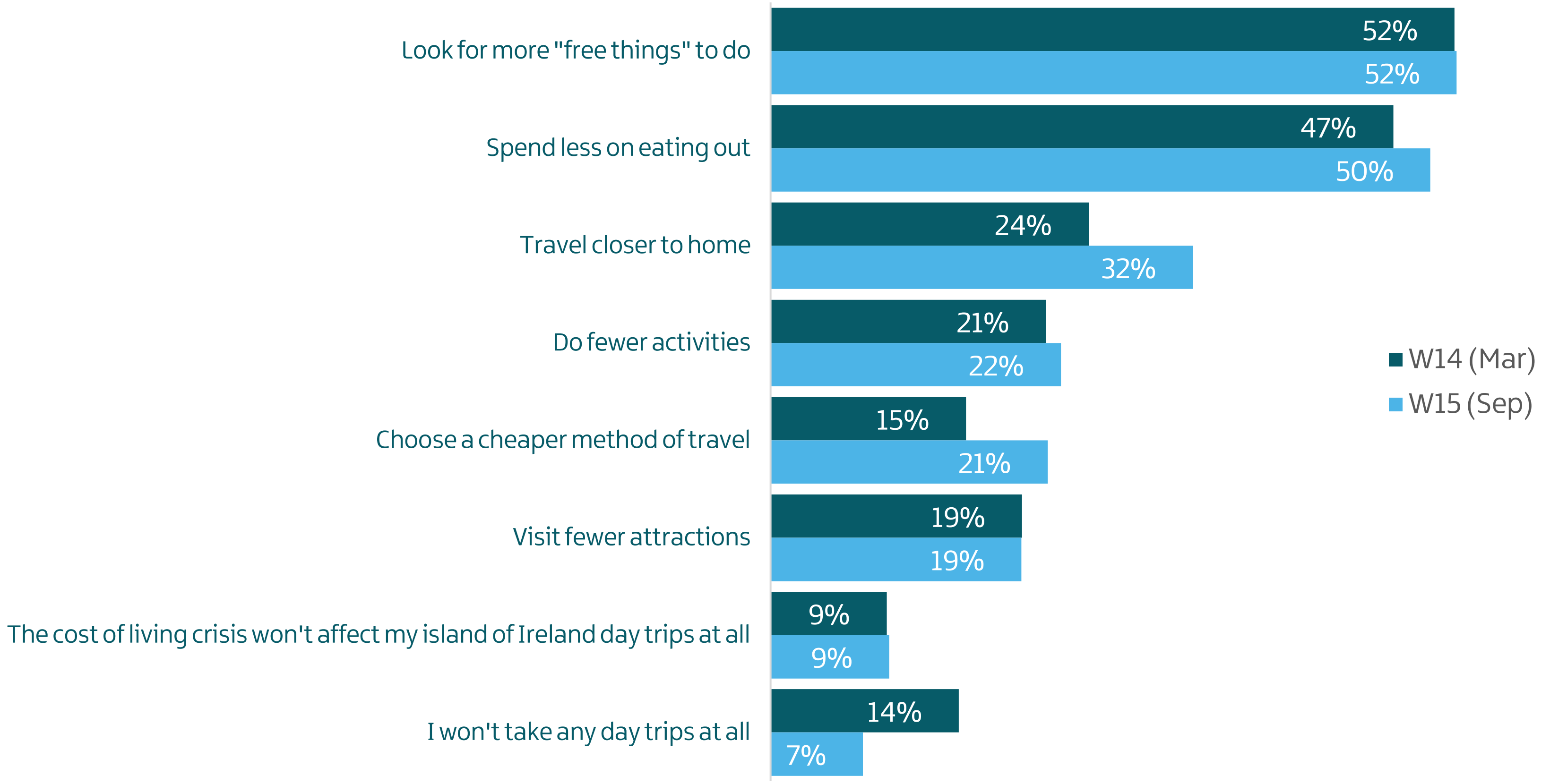
35-54s are more likely to say take a break / holiday in NI instead of abroad (25%) and they'll go to a cheaper destination abroad (32%)

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?

Travelling closer to home is becoming more important to people in NI, compared to previous wave

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



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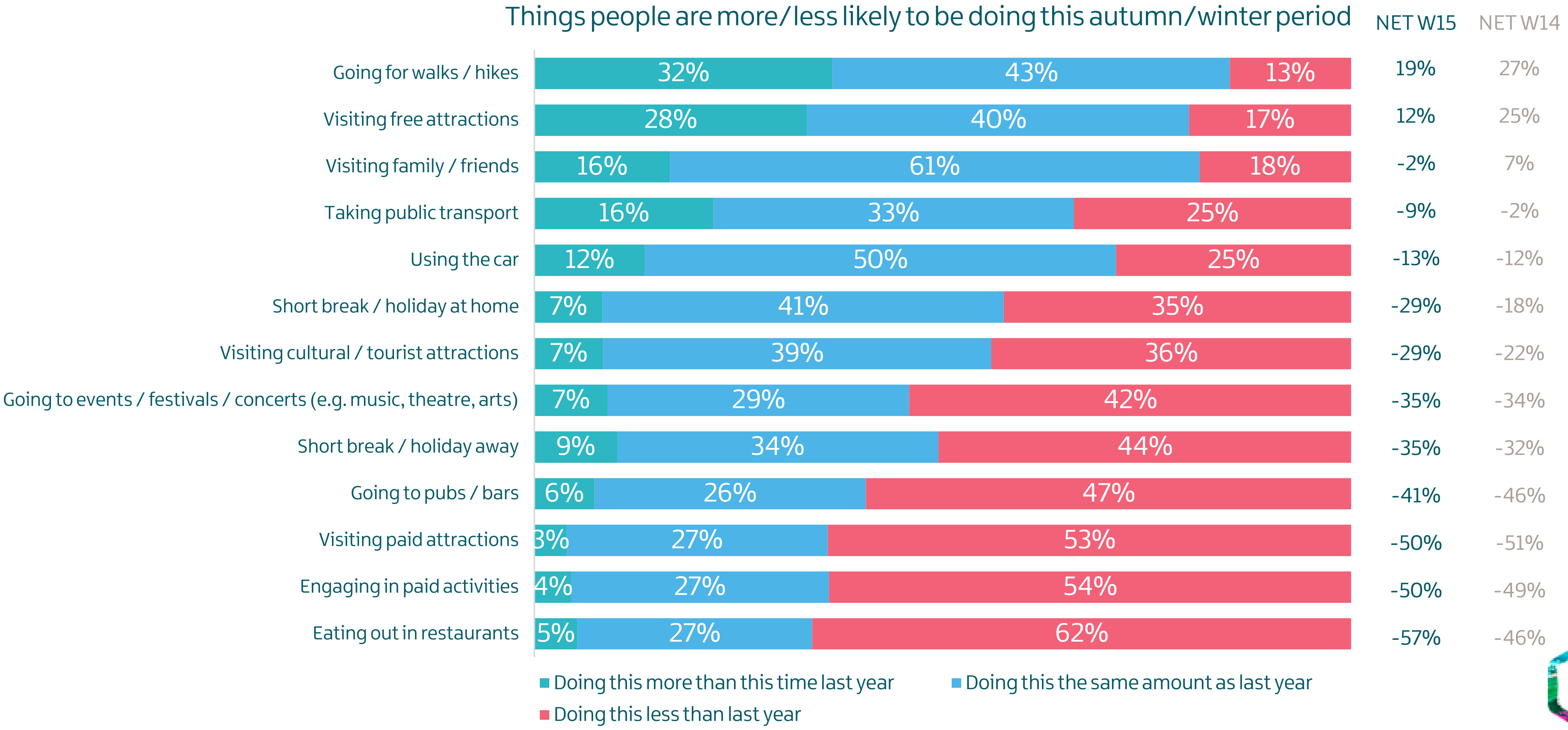
N = 400

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?

After an improvement in March, there are some drops in what people are likely to be doing across the board



N = 400

F8. Compared to this time last year, which of the following are you likely to be doing more or less of over this autumn/winter period (Sep to Dec)?

Summary

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Summary – NI Market

Domestic trips taken in NI in 2024 stable vs. 2023; experiences still positive	- Findings indicate a largely stable performance from the NI market for overnight trips taken during the first nine months of the year, but growth in day trips. - For those consumers who have taken a recent domestic break, the vast majority said their trip matched or exceeded expectations, with the opportunity to enjoy the outdoors, range of places to eat & drink and the welcome & hospitality being particularly highly rated.
NI travel intentions stable	- In relation to the last quarter of the year and looking ahead to early 2025, stable NI trip intentions are evident for domestic consumers. Competition from abroad remains strong however, with many NI consumers considering taking a break abroad in the next six months. - Trip motivations are beginning to change, we see a rise in people wanting to have fun and enjoy food and drink. Relaxation and escapism remain on top however.
VFM perceptions drop but still in a strong position	- VFM has dropped over the past to waves from +15 to +6, meals out and accommodation are the main areas dropping back that may have contributed to this. However, NI consumers continue to rate NI as a better value for money tourism destination than ROI and GB.
Cost of living still affecting trips but people are feeling the impact less than before	- Increased cost of living was rated as the top barrier for taking a trip to NI over the next six months by NI consumers, with cost of accommodation another key barrier. - When considering day trips, around half said they would look for more free things to do. There is also an increase in the number saying they will spend less on eating out. - In relation to holiday behaviour, a considerable proportion of consumers say they would choose a cheaper destination abroad over a staycation, likely influenced by the strong perceptions that prevail regarding better VFM.

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