Tourism Northern Ireland Consumer Sentiment Research

ROI Market – Wave 15

October 2024

TOURISM NORTHERN IRELAND

Research background

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Research background & objectives

This is the 15th wave of our consumer sentiment barometer for the Republic of 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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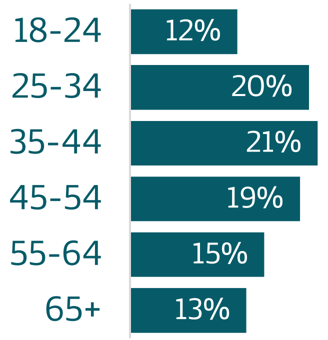
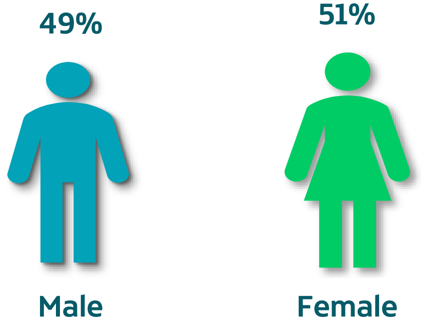
Sample – We spoke to a robust, nationally representative sample in the Republic of Ireland

Age

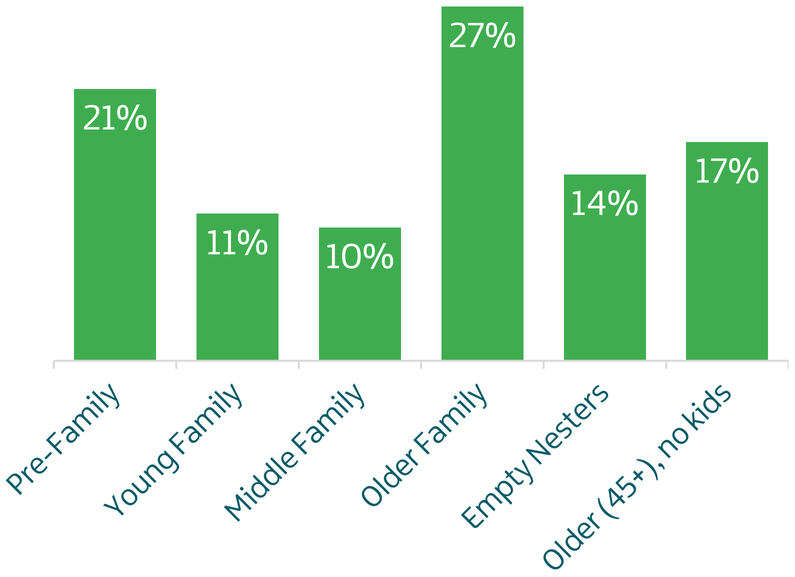


Gender

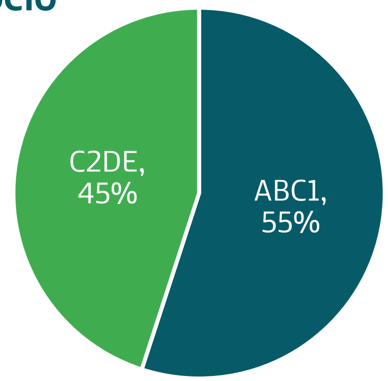


1% describe in another way

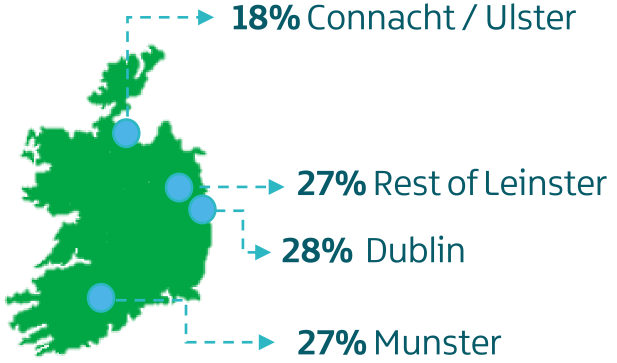
Lifestage



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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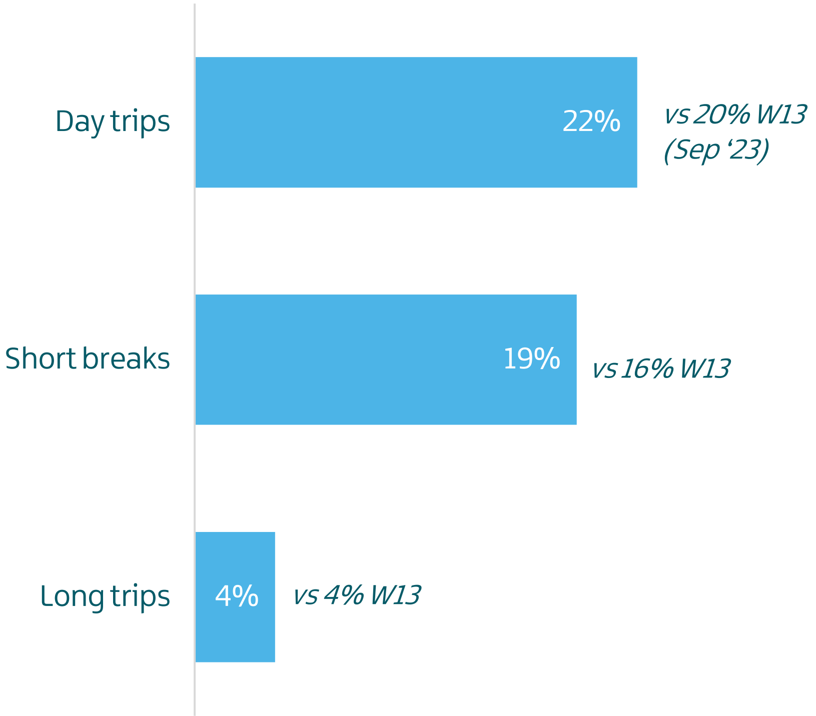
Increase in number taking trips to NI, ROI and abroad this year vs. last year

21%
have taken a **short or long break to** NI in 2024

% of total sample who took a trip to NI



Other than NI…

51% took a break in ROI ↑
vs 45% in W13

54% went abroad ↑
vs 41% in W13

18% didn't travel at all
vs 18% in W13

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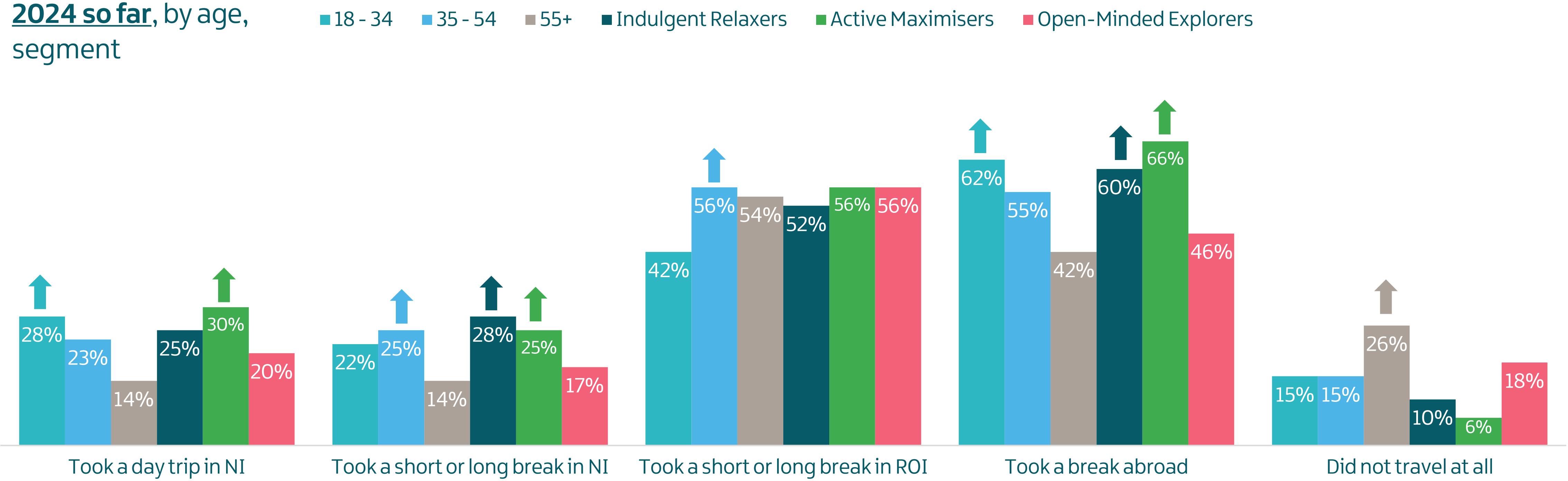
N = 750

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 2024?

35-54s most likely group to have taken NI trips; under 35s went abroad

% who travelled **in 2024 so far**, by age, segment



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N = 750

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?

Restaurants, shopping, and local pubs / bars are the top experiences for those visiting in 2024

What they visited / experienced on NI short & long trips in 2024

Families more likely to have done outdoor sports / activities (21%)

Post-family life stages more likely to have visited stately homes / castles / museums (37%)

N = 158 took short / long trip in NI

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

A number mentioning advertising as a reason for visiting, with word of mouth / bucket list also coming through

First-time visitors – what drove them to come to NI

Advertising

- I saw the advertisements on TV and it looked a nice place to visit
- I saw discover Northern Ireland on television and decided to go
- Good advertising and great job in welcoming people

Word of mouth

- Hearing about how cheap it was when compared to the Republic of Ireland
- Because I have heard so much about Northern Ireland and I was eager to see things myself
- I had always wanted to visit as my friends and family often recommended it

Something new / specific attraction

- I was looking for somewhere that we hadn't visited before within Ireland
- Change and wanted to see some history and meet locals
- Wanted to visit the Carrick-a-Rede Rope Bridge and Giant’s Causeway.

Had always wanted to

- It was always on my bucket list
- We had been looking to travel to Northern Ireland and stay over for a long time. The time was right for us

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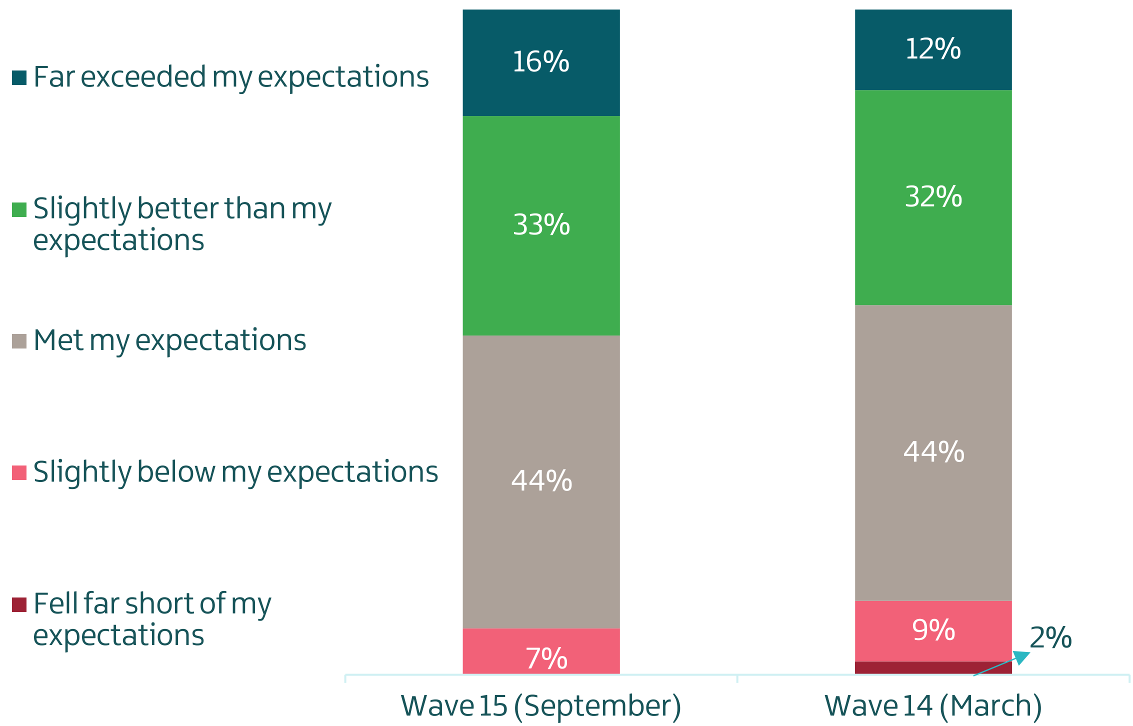
And expectations are still very much being met or exceeded – slight increase vs. March

93%

had their expectations met or exceeded

vs 91% in Wave 14 (March)

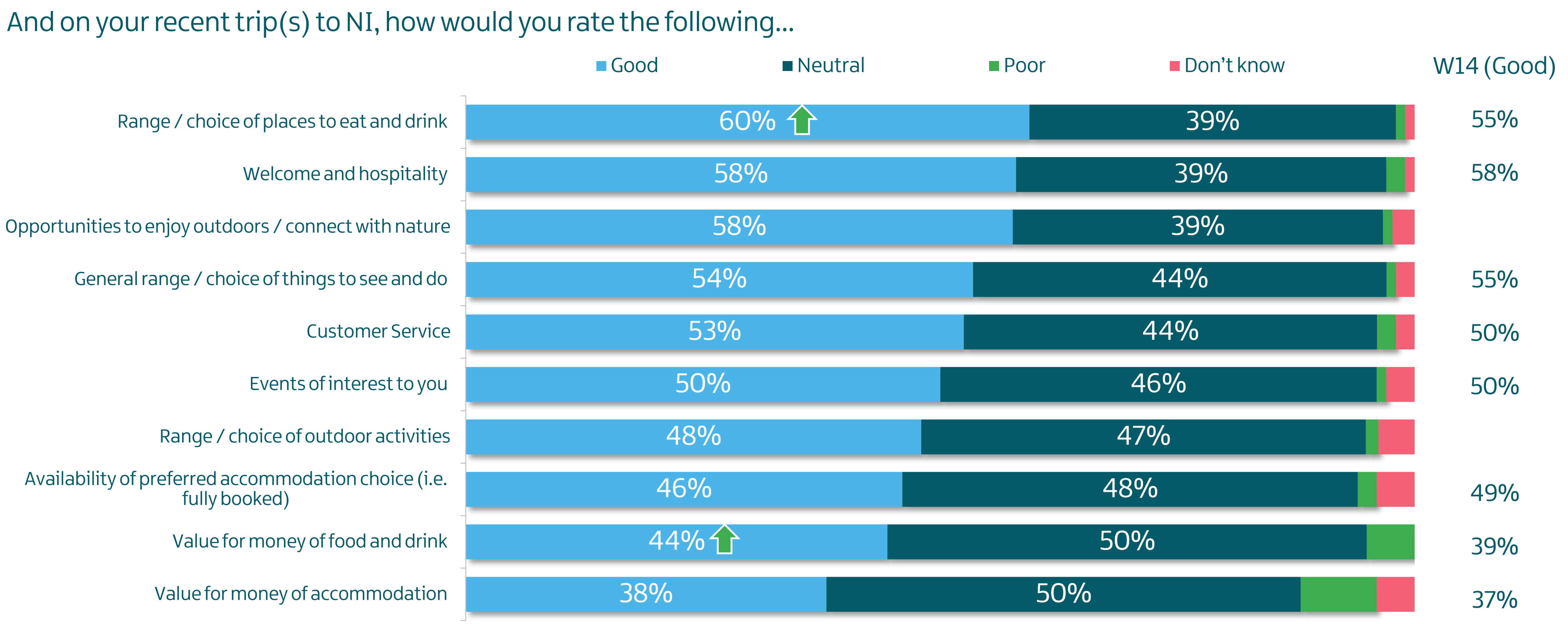
Those who visited NI felt their trip...



N = 246 (any break in NI in 2024, inc. day trips)

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

Range / choice of food & drink and welcome / hospitality highly rated



N = 316 (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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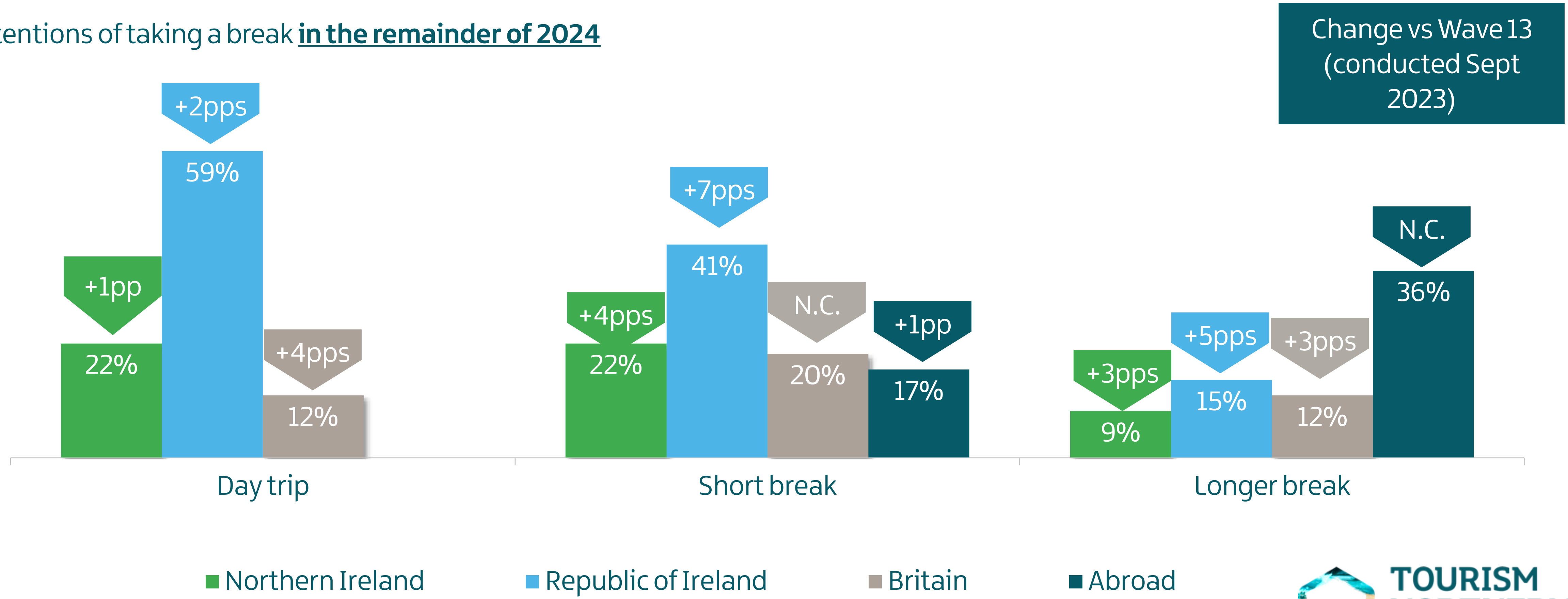
Increases seen for all destinations compared to this time last year – with increases for short & long breaks to NI

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



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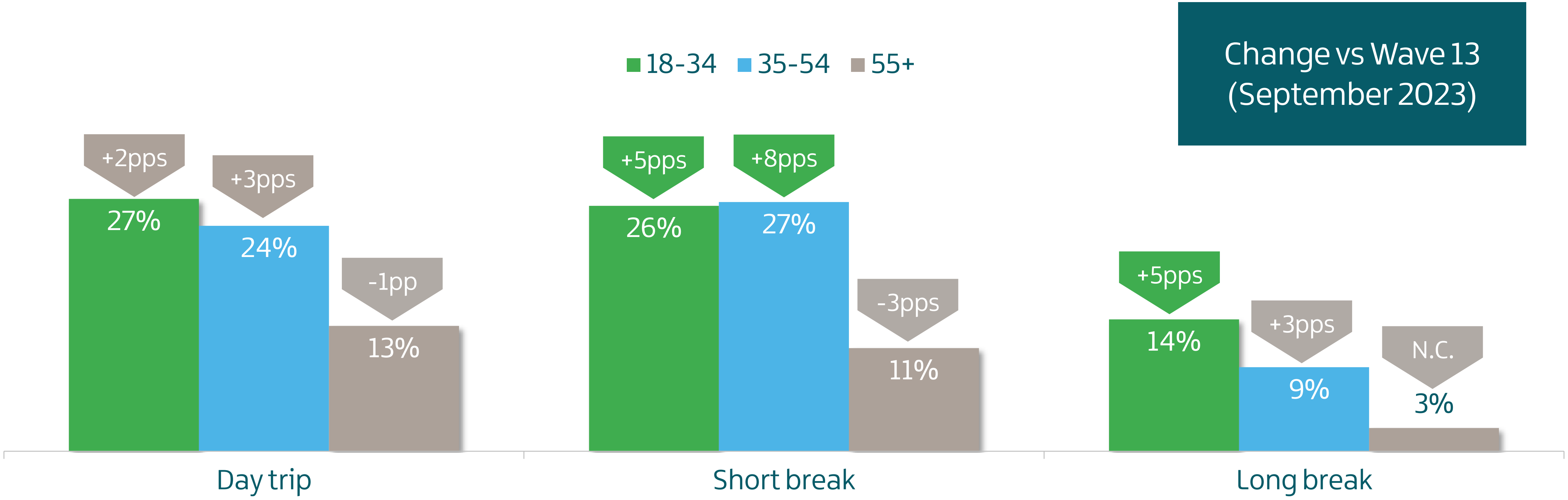
N = 750

E1b/c/d. 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 remainder of 2024 (September to December)?

Increases in NI trip intentions are largely down to younger and mid age groups

Trip intentions of taking a break in **NI** in **autumn / winter 2024** – by age



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

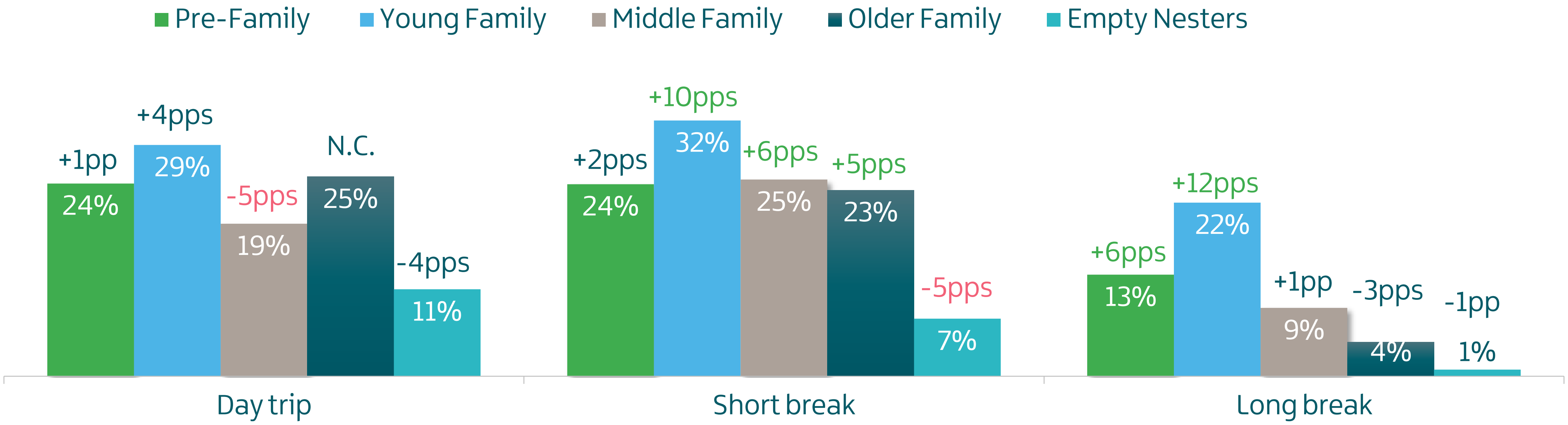
E1. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the remainder of 2024 (September to December)?

Green = sig. increase vs. W13

Increases in NI intentions are being strongly driven by families – especially those with younger children

Trip intentions of taking a break in **NI** in **autumn / winter 2024** – by life stage

Change vs Wave 13 (September 2023)



N = 155 (Pre), 84 (Young), 76 (Mid), 203 (Older), 107 (Empty Nesters)

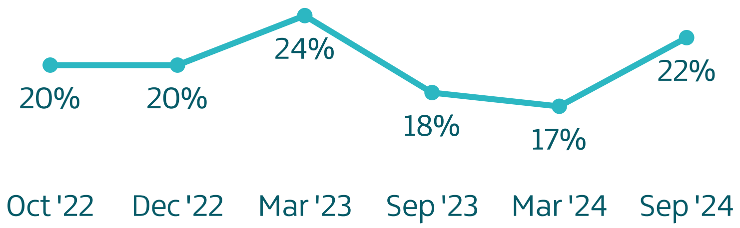
E1. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the remainder of 2024 (September to December)?

Green = sig. increase vs. W13; red = sig. decrease

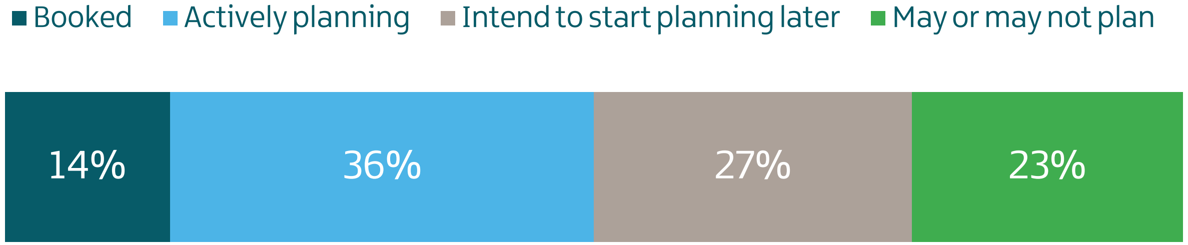
Short trip intentions for NI improve vs. the past 2 research waves, closer to levels seen in early 2023

22%

are considering a short break in NI in Sept - Dec

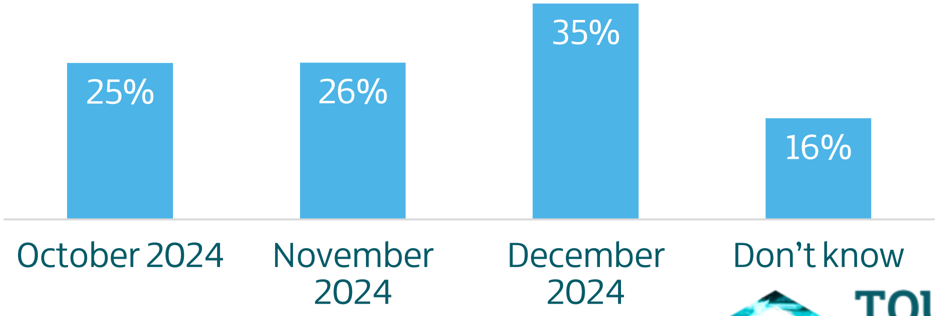


Status of short break – have they booked?



50% are actively planning or have booked a trip to NI – **11%** of the total sample

Short break planned for



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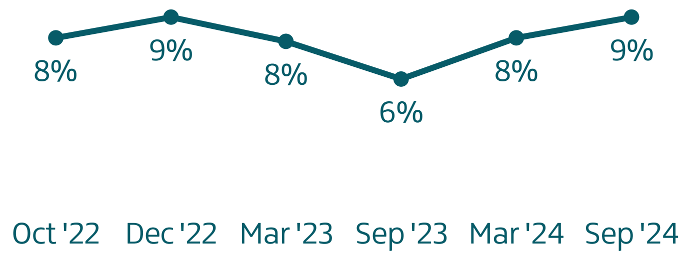
N = 750 / 167 considering short break

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 remainder of 2024 (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?

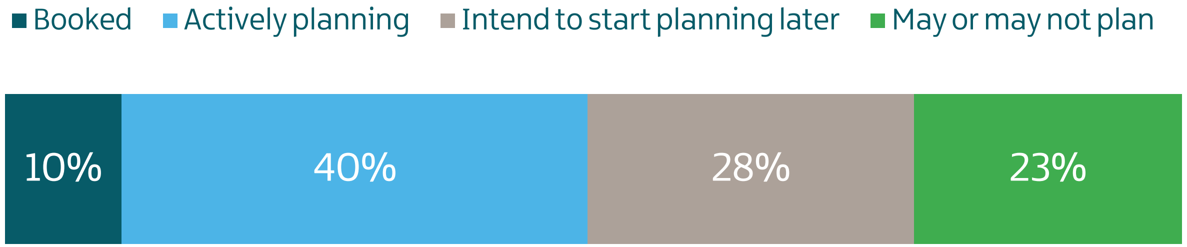
Little change in long trip intentions vs. Sept '23 – broadly stable over past 2 years of tracking

9%

are considering a long break in NI in Sept - Dec

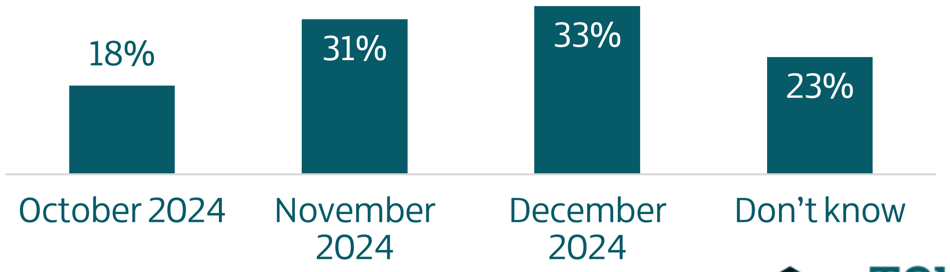


Status of long break – have they booked?



50% are actively planning or have booked a trip to NI – **5%** of the total sample

Long break planned for



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N = 750 / 66 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 (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?

Repeat visits are driven by enjoyment of attractions, experience of scenery; mentions of people / shopping too

What prompted people to take another trip

Scenic beauty and nature

- Beautiful countryside.
- I think the scenery in NI is superb
- I like the food, culture, and the scenery. It's beautiful

Shopping

- Good value and chance for shopping too
- Shopping for Christmas
- To go shopping as I've heard it's cheaper

Previous positive experience

- I enjoyed it the last time I was there but did not have enough time
- After my last trip, I want to go again
- Love the people and the scenery is breathtaking
- Really enjoyed my previous trip
- It's a beautiful place that I love visiting
- Lovely people and great atmosphere

Sightseeing and attractions

- Would like to see Belfast and go on the Titanic tour
- I want to explore more and go to the Giant's Causeway
- I want to see more places and attractions
- I want to explore more and see what I did not see last time

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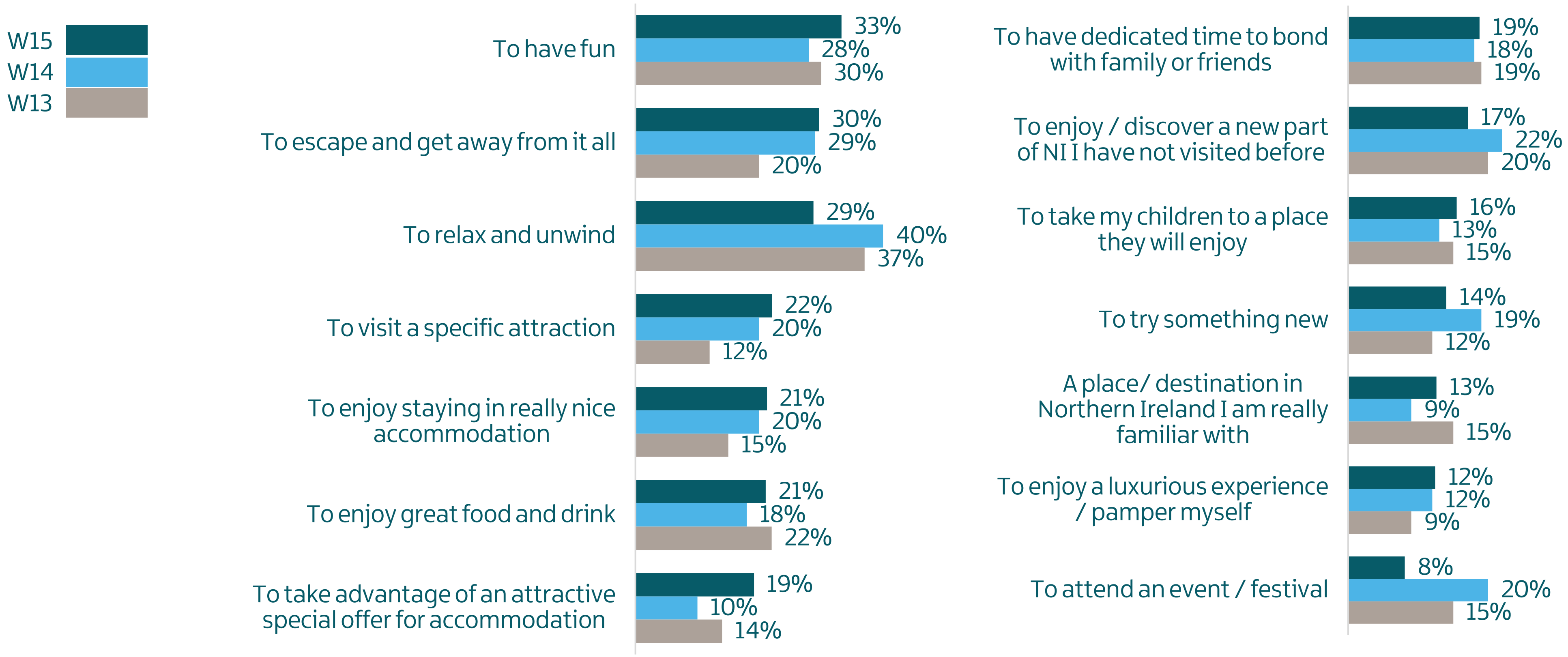
CB1. You mentioned you plan to take another trip in Northern Ireland in the next 6 months. What has prompted you to take another trip in Northern Ireland?

Fun overtakes relaxation as top trip motivation for coming months – although top 3 remain the same

Trip motivations (long and short combined)



Active Maximisers more likely to be travelling to NI to take their kids somewhere they will enjoy (22%)

Open-Minded Explorers more likely to want to relax and unwind (40%) or to be attending a specific event (22%)

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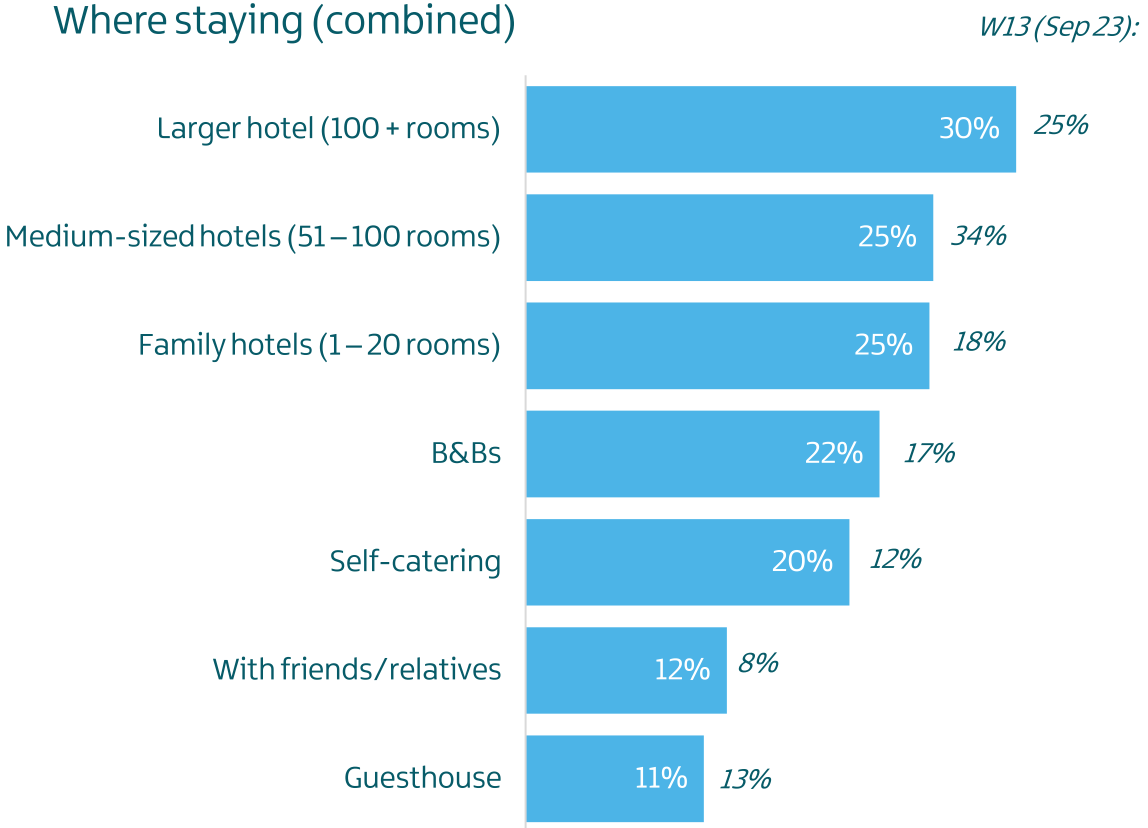
N = 145 planning long or short break (excl. "may or may not plan")

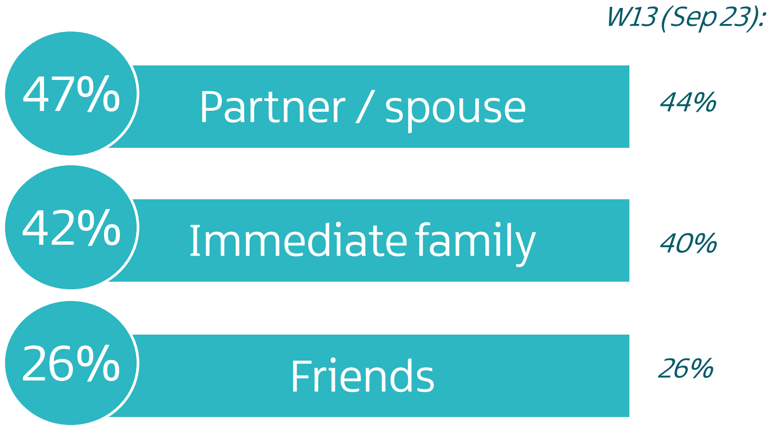
E4a. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the trip?

Increase in people staying in large / family hotels – although self-catering also grows

Where staying (combined)



Who travelling with (long & short combined)

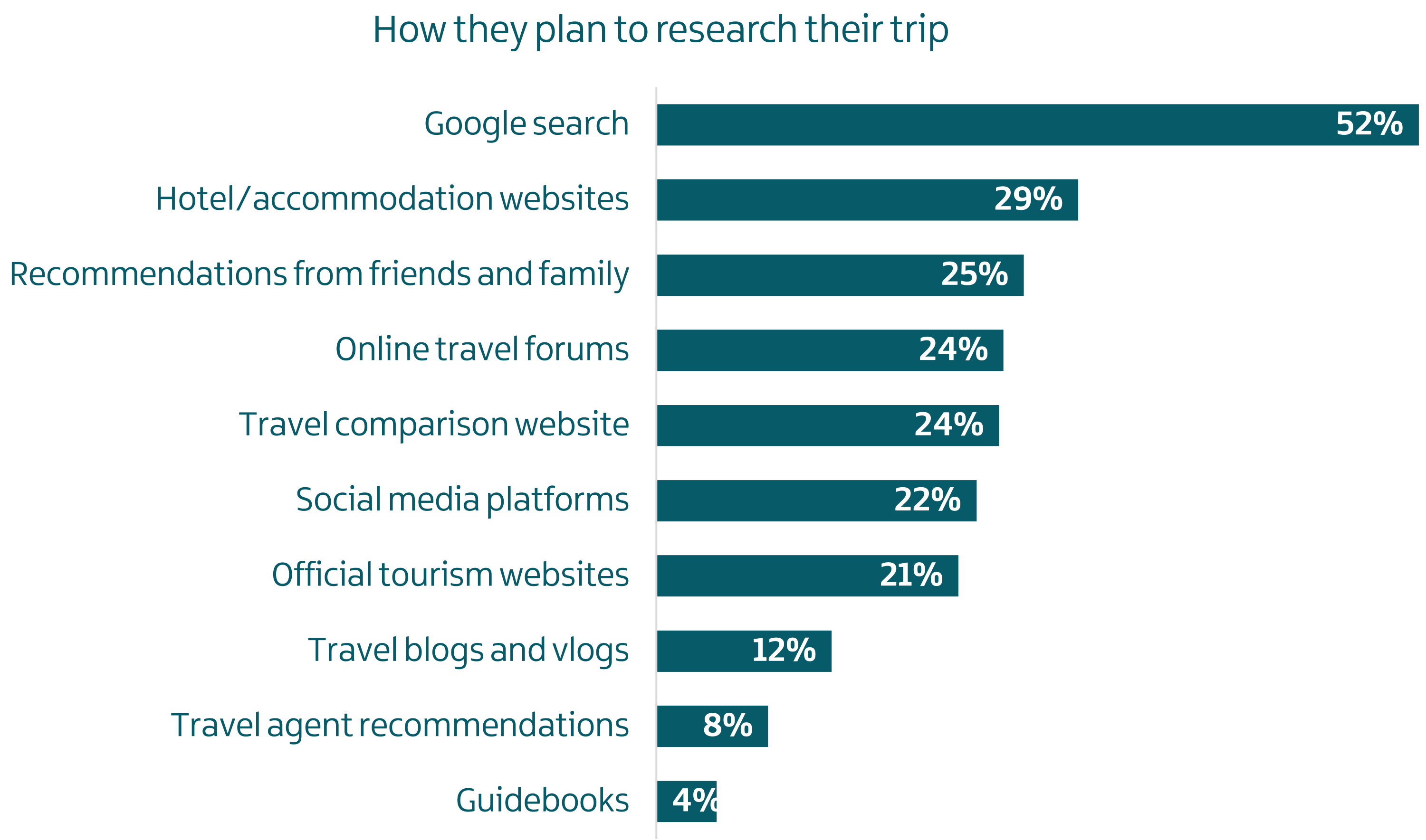


TOURISM NORTHERN IRELAND

N = 145 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?

Other than Googling, accommodation websites and recommendations are the main way to research trips



Booking.com is again the main choice of comparison site – 76% doing research via this site. 14% are doing research via Trivago

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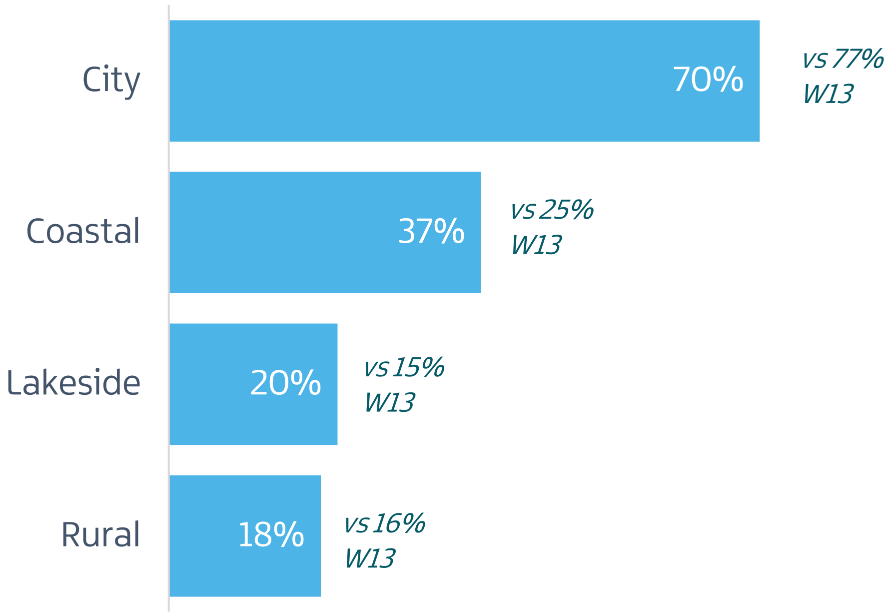
N = 145 planning long or short break (excl. "may or may not plan")

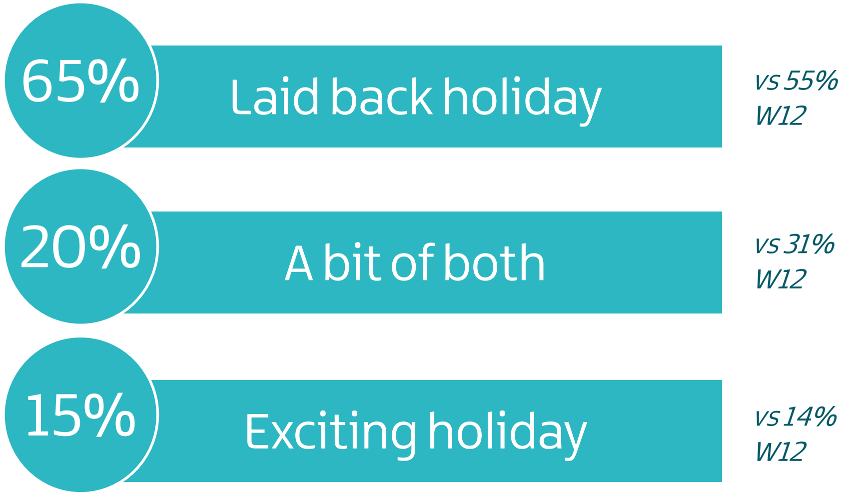
E10. And where do you plan to research accommodation, activities, travel, etc. for your upcoming trip in Northern Ireland? / E10b. You mentioned you plan to use a travel comparison website to research your upcoming trip in Northern Ireland. Which website do you plan to use?

Laid-back / coastal holidays are on the up vs. September 2023 – although city breaks remain the main trip type

Type of break preferred



Type of trip preferred



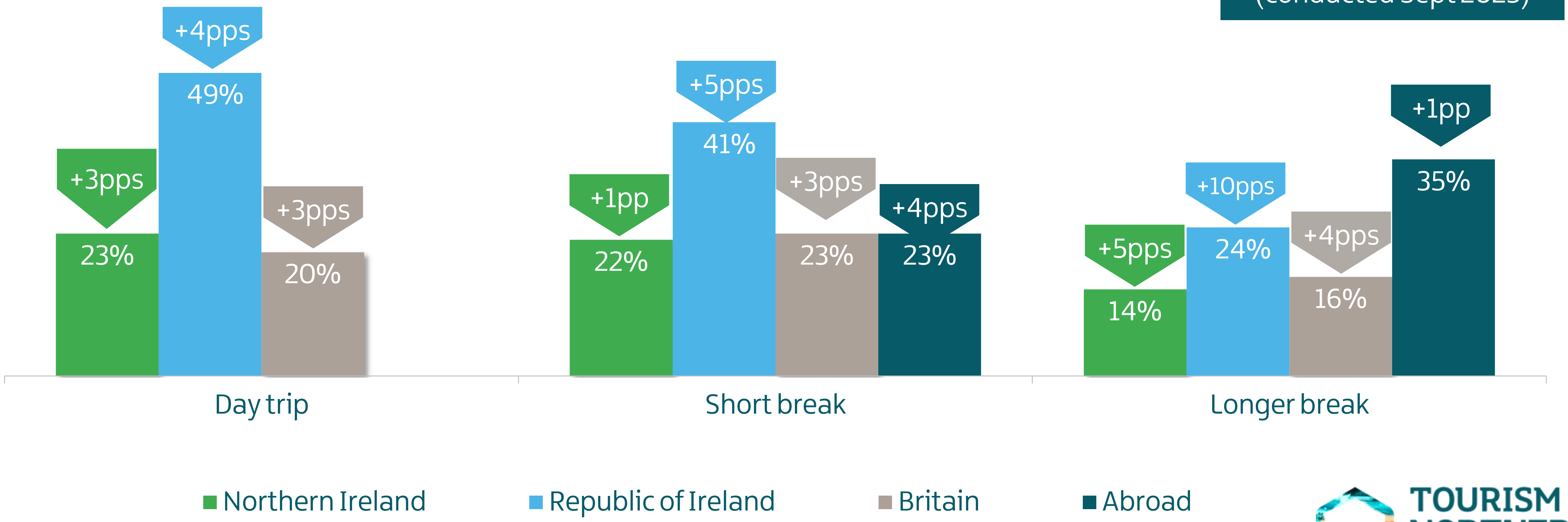
N = 145 planning long or short break (excl. "may or may not plan")

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?

Increase in NI long break intentions. ROI trips also see a spike vs. Sept 2023; trips abroad remain stable

Intentions of taking a break in **January – April 2025**

Wave 15 vs Wave 13 (conducted Sept 2023)



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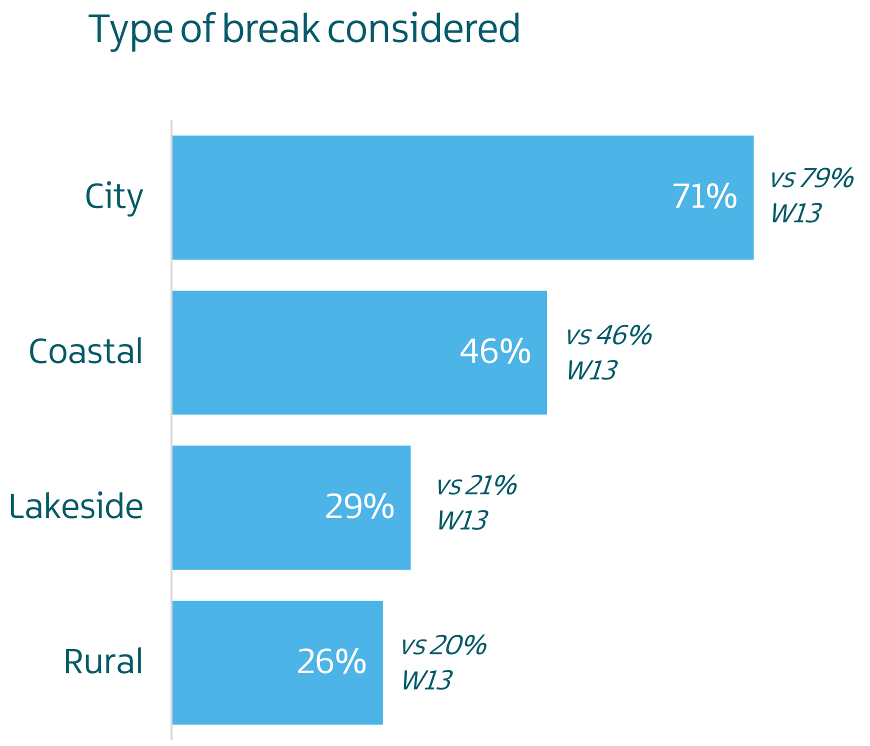
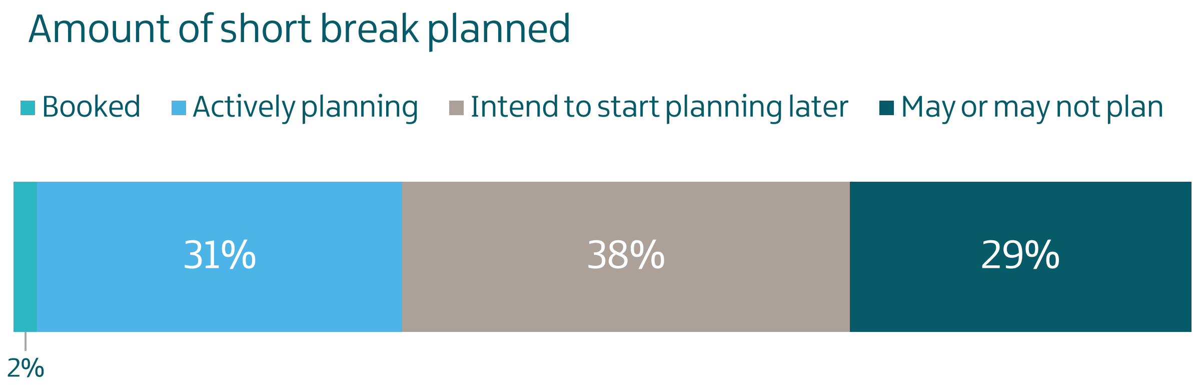
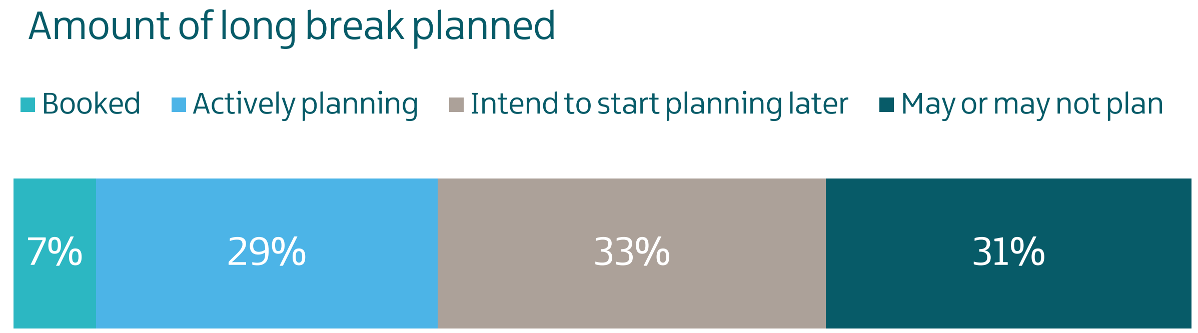
N = 750

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

City break consideration also down slightly for early 2025, with lakeside / rural breaks on the increase







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N = 182 considering long or short break in early 2025

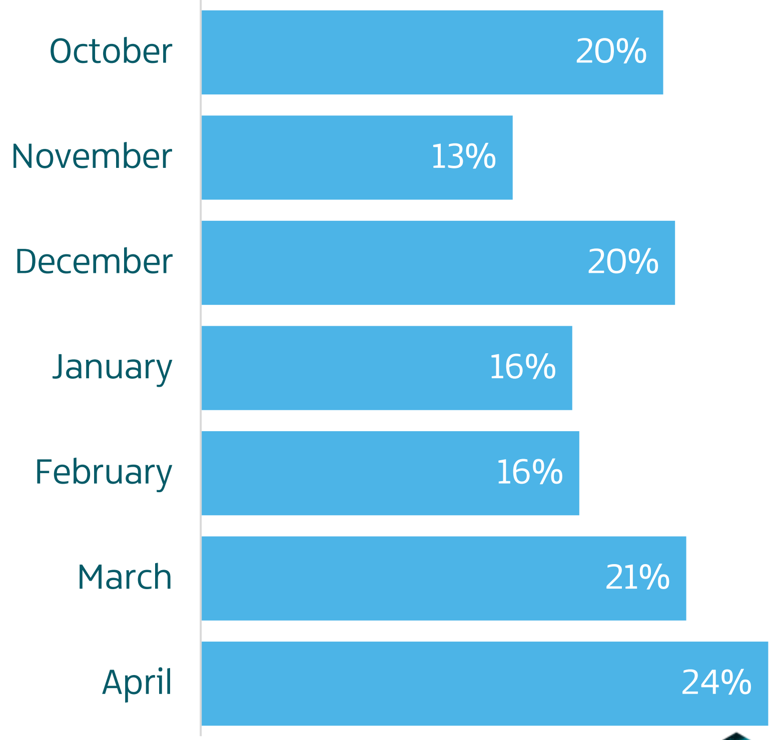
E24c. Which of the following destination types would you consider in winter/spring 2025 (January to April)? E25 Thinking about the short/long trip(s) you said you would consider for in winter/spring 2025 (January to April) in Northern Ireland, have you booked or thought about planning this short/long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

Trip abroad intentions are stable vs. September 2023. Most trips planned during school holidays / early spring

54% of total sample are considering a break abroad in the next 6 months
(vs. 54% W13)

61% of this cohort are actively planning or have booked their trips
(vs. 58% W12)

When trips abroad are planned for



N = 403 considering trip abroad

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

Value for money

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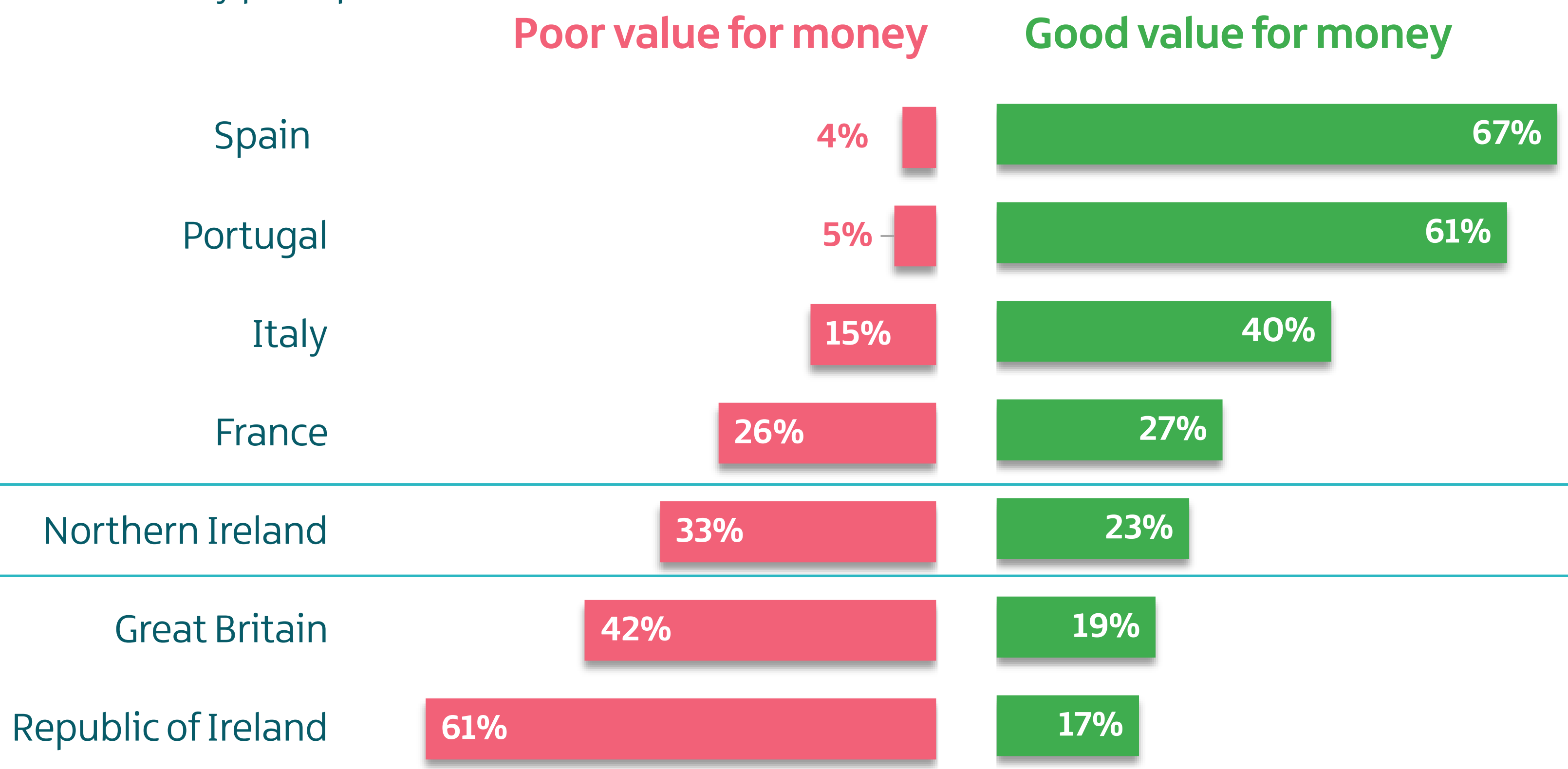
Value for money net score sees a slight drop vs. March 2024

Value for money perceptions



Net Score

	Sep '24 (W15)	Mar '24 (W14)	Sep '23 (W13)
Spain	+63	+67	+67
Portugal	+56	+53	+56
Italy	+25	+26	+18
France	+1	-1	-3
Northern Ireland	-10	-8	-13
Great Britain	-23	-26	-29
Republic of Ireland	-44	-42	-58

**VFM Net Score is calculated by subtracting the % who rated poor VFM from the % who rated good VFM, i.e. if 33% rated a market as poor VFM and 23% rated it as good VFM, the Net Score would be -10.*

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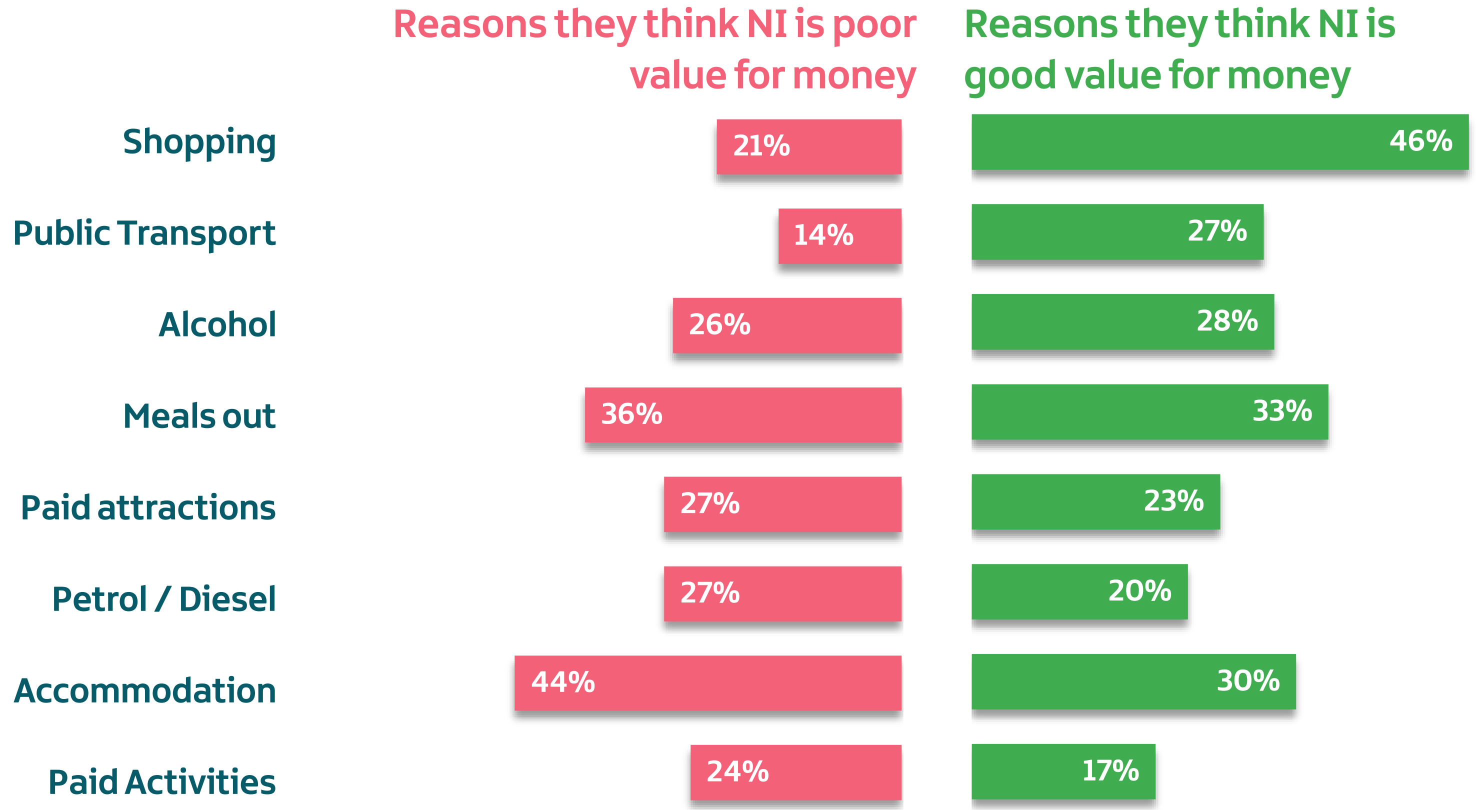
N = 750

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

Alcohol and accommodation drop back in terms of VFM perception – may be contributing to overall dip

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	+25%	+27%	+32%
Public Transport	+13%	+16%	+16%
Alcohol	+2%	+16%	+0%
Meals out	-3%	0%	+5%
Paid attractions	-4%	-3%	-3%
Petrol / Diesel	-7%	-7%	-17%
Accommodation	-14%	-8%	-8%
Paid Activities	-7%	-9%	-6%

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

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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

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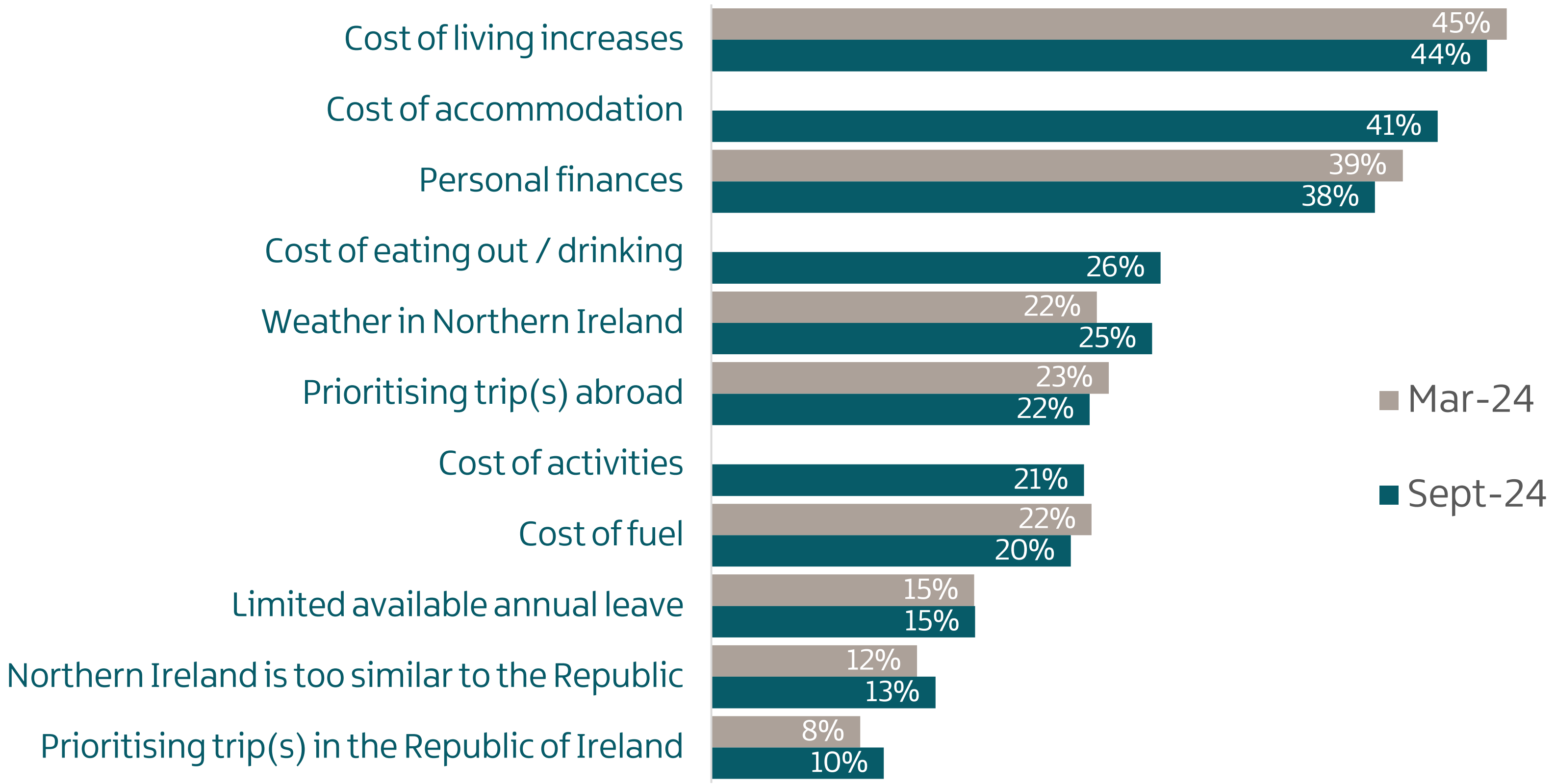
Cost remains at the forefront of people's minds when it comes to barriers to travel to NI

What could stop them going to NI



NB some additional options were added for this wave so scores are not directly comparable

ABC1s more likely to say NI is too similar to ROI (16%)

18-34s more likely to mention cost of living increases (50%)

Over-55s more likely to mention weather in NI (33%)

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N = 750

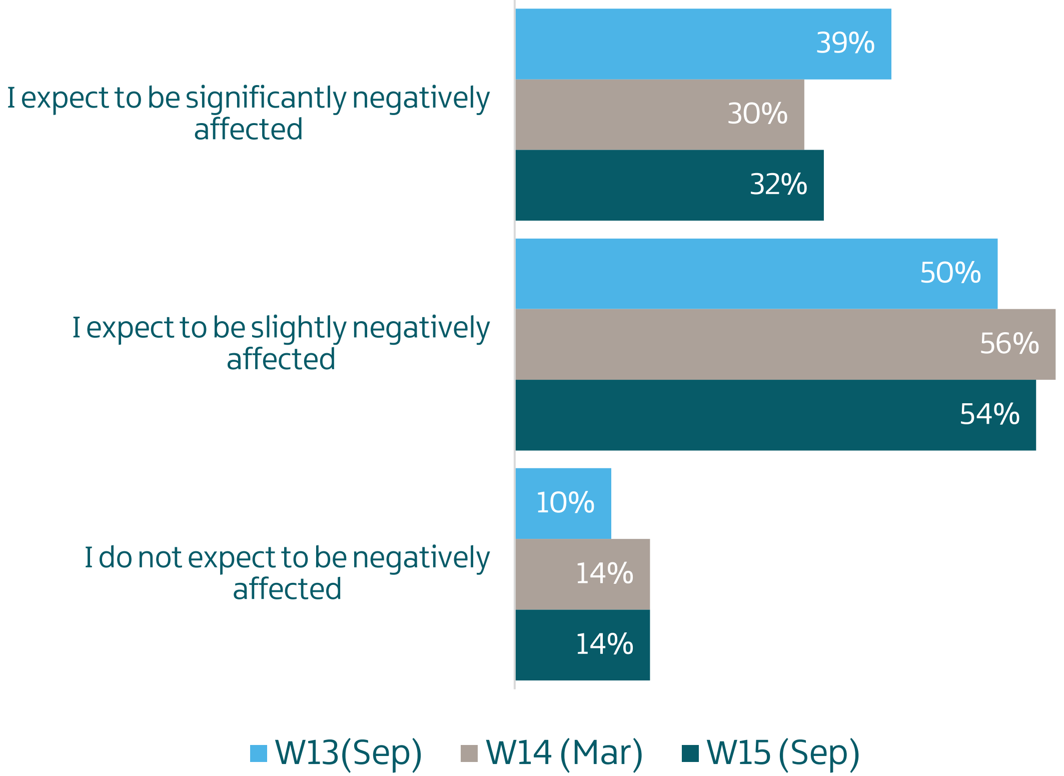
F0. Which, if any, of the following factors do you see as potential barriers to you taking a short break or holiday in Northern Ireland in the next six months?

The vast majority are still affected negatively by the cost-of- living crisis, but no change in overall number

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

86%

expect to be affected by cost of living increases

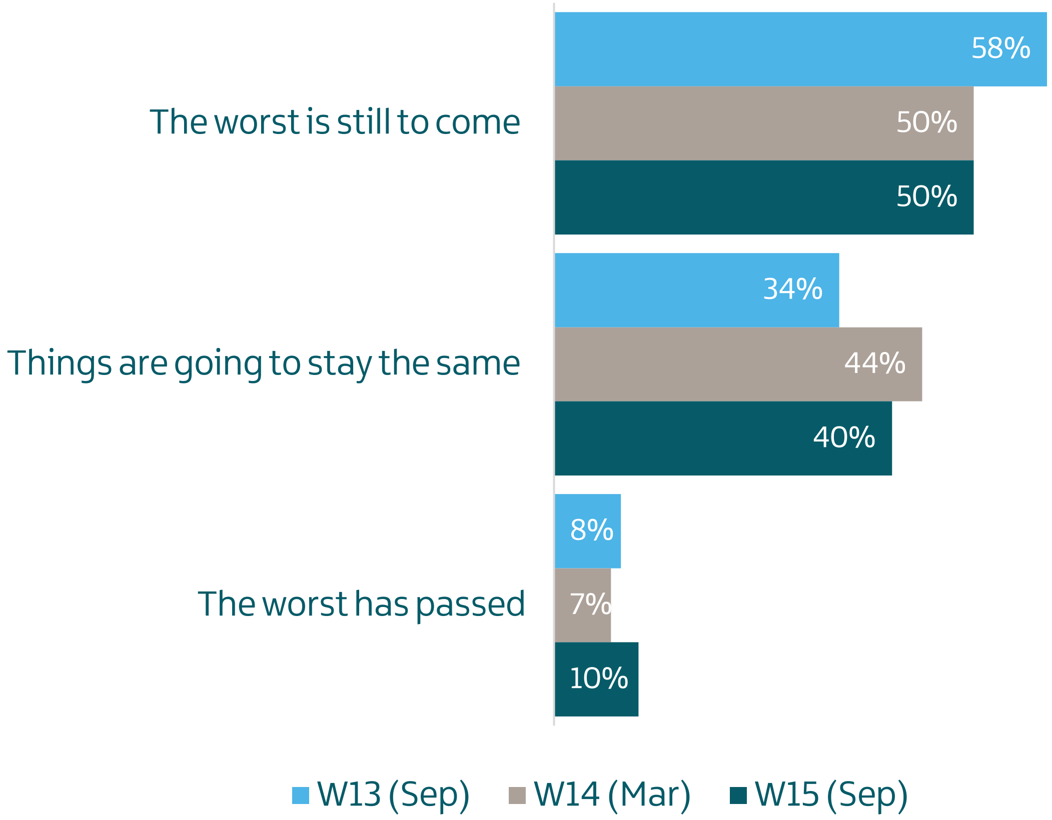


N = 750

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

While there is still significant negativity about the situation in coming months, many think things are settling

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



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?

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Increases in travelling less vs. Sept 2023 and interest in deals also grows

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

Women are more likely to say they'll take a cheaper trip abroad (38%), as are ABC1 (36%)

Families more likely to take fewer holidays (27%), while pre-family are more likely to not travel at all (23%)

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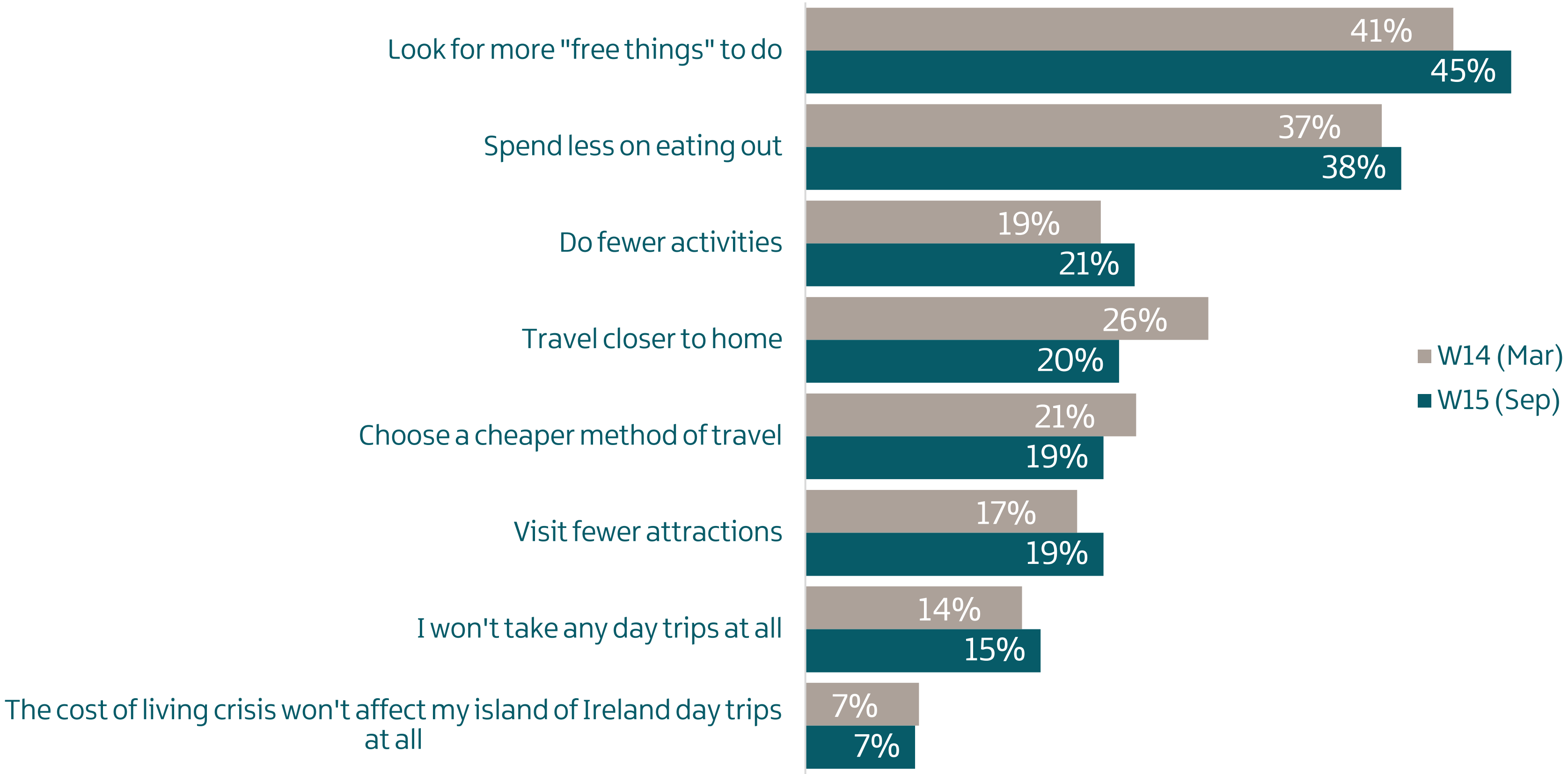
N = 750

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?

Doing fewer or free activities and spending less on eating out are main ways to combat cost-of-living on a day trip

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



Those planning day trips in NI are more likely to say they'll spend less on eating out (46%) and look for more free things to do (56%)

18-34s more likely to choose a cheaper transport method (26%)

Over-55s more likely to take no day trips at all (25%)

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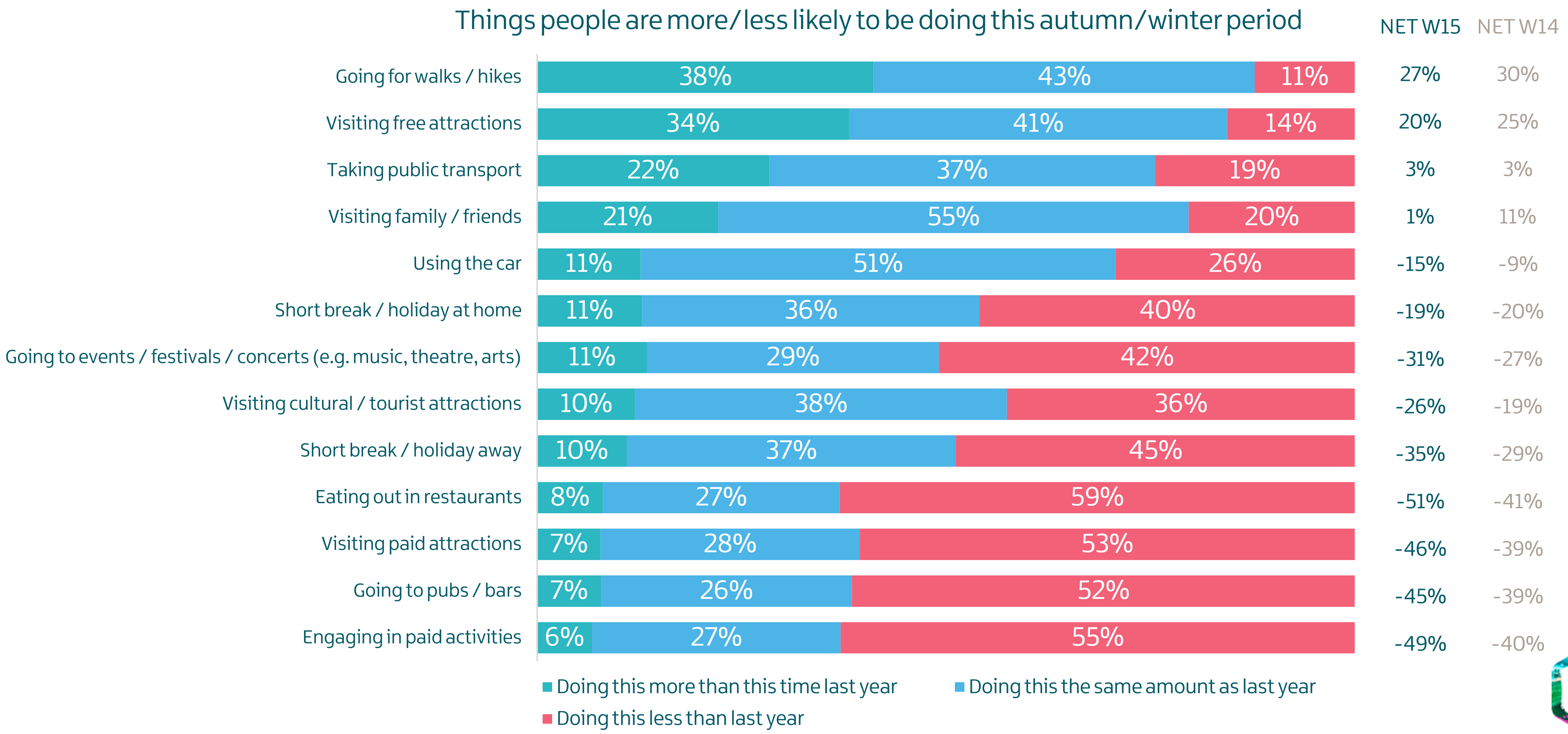
N = 750

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?

People are less likely to be doing things / going out as we head into autumn



N = 750

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 – ROI Market

ROI trips taken in NI in 2024 stable vs. 2023; experiences still positive in NI

- ROI trips taken in NI in 2024 vs 2023 remain largely stable, with significant increases in ROI domestic trips (up 6pps to 51%) and trips abroad ROI and abroad (up 13pps to 54%).
- Day trips taken in NI remain highest among 18-34s and short / long breaks highest among 35-54s. There was a slight increase in the number saying their NI trips met or exceeded expectations, with food and drink appearing to drive this – increases in scores for range and value for money.

NI and ROI trip intentions also increase

- Increases in NI trip intentions for the end of 2024 – up 4pps for short breaks, to 22%, and up 3pps for long breaks, to 9%. These represent a recovery after we saw notable dips in intentions in previous waves.
- Increases in NI trip intentions for early 2025, notably for long trips (up 5pps to 14%). There appears to be a general increase in appetite for trips on the island of Ireland, with ROI trip intentions also increasing for the rest of 2024 and into early 2025. Trip abroad intentions have stabilised after a continued spell of growth.

Increase especially seen among younger cohort

- Growth in NI trip intentions driven by an increase among younger cohort (18-34s) for both short and long trips; those with kids under 5 in particular, see significant increases.
- Types of trips planned change slightly vs. this time last year; more of a focus on laid-back holidays and coastal trips, although city breaks remain the dominant type of trip planned.

Cost of living remains an issue, but NI rated a better VFM destination than ROI and GB

- Despite some slippage in value for money perceptions of accommodation and the cost of eating out, consumers in both markets continue to rate NI as a better value for money destination than ROI and GB.
- Despite trip intentions improving for NI and ROI, cost-of-living concerns have not abated significantly – 86% still expect to be impacted to some extent, and 50% predict that the worst is still to come. In terms of how this will impact holidays and short breaks, there is a slight increase in the number saying they won't travel at all, as well as an increase in the number mentioning they will place an importance on deals and packages.
- When considering day trips, around half said they would look for more free things to do. There is also an increase in both markets in the number saying they will spend less on eating out.

TOURISM NORTHERN IRELAND