Consumer Sentiment
NI Market
September 2021

tourism northernireland

SPARK
The Strategic Insight Agency

Research Background

Research Background & Objectives

This is the fifth wave of our consumer sentiment barometer for Northern Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere

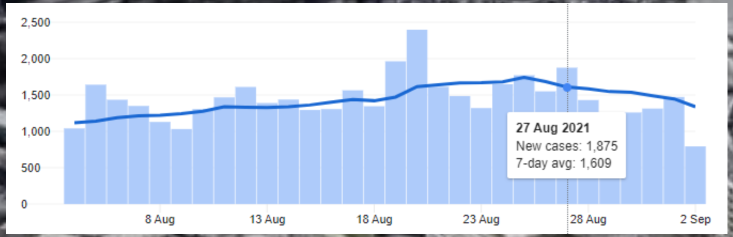
The research objectives:

- Determine the current consumer sentiment towards Covid
- Explore current attitudes towards travel
- Understand recent travel experiences in NI
- Assess current attitudes towards travel in NI, ROI and further afield

What was happening during fieldwork?

FW Dates 12th – 27th Aug

Covid cases grow slightly in NI and ROI throughout August



12th Aug

Ministers agree to relax self-isolation rules in NI

16th Aug

NI doctors raise concern of rising numbers refusing to wear masks

NI Covid Statistics

BBC News NI @BBCNewsNI · Aug 21

Northern Ireland has the highest death rate, highest infection rate and lowest vaccination rate in the UK - overall, Northern Ireland's latest Covid-19 statistics make for grim reading

We interviewed a robust, nationally representative sample in Northern Ireland

Total sample = 400

Gender

51% **Male**

49% **Female**

Social Grade

45% ABC1

55% C2DE

Age

18-34 years **30%**

35-54 years **37%**

55+ **33%**

Lifestage

PreFamily **23%**

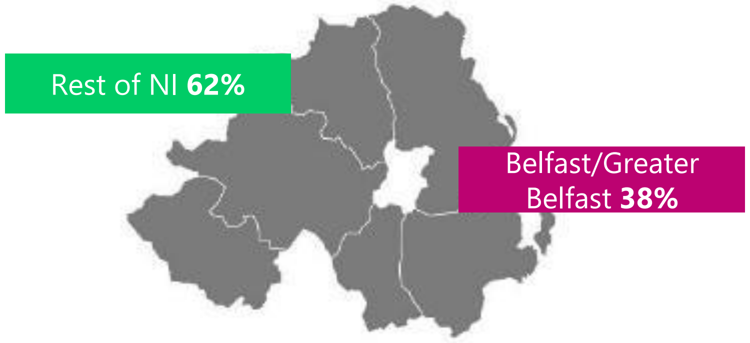
Young family **8%**

Middle Family **12%**

Older Family **18%**

Empty Nesters/ Older (45+) no kids **39%**

Region



Key Takeaways

Spike in cases has triggered sense of nervousness among many

- Number who say they expect the worst is still to come, goes up for first time in 2021, while anxiety levels remain stable vs. April

Safety perceptions also damaged – Covid-security even more important for NI holidaymakers than ROI

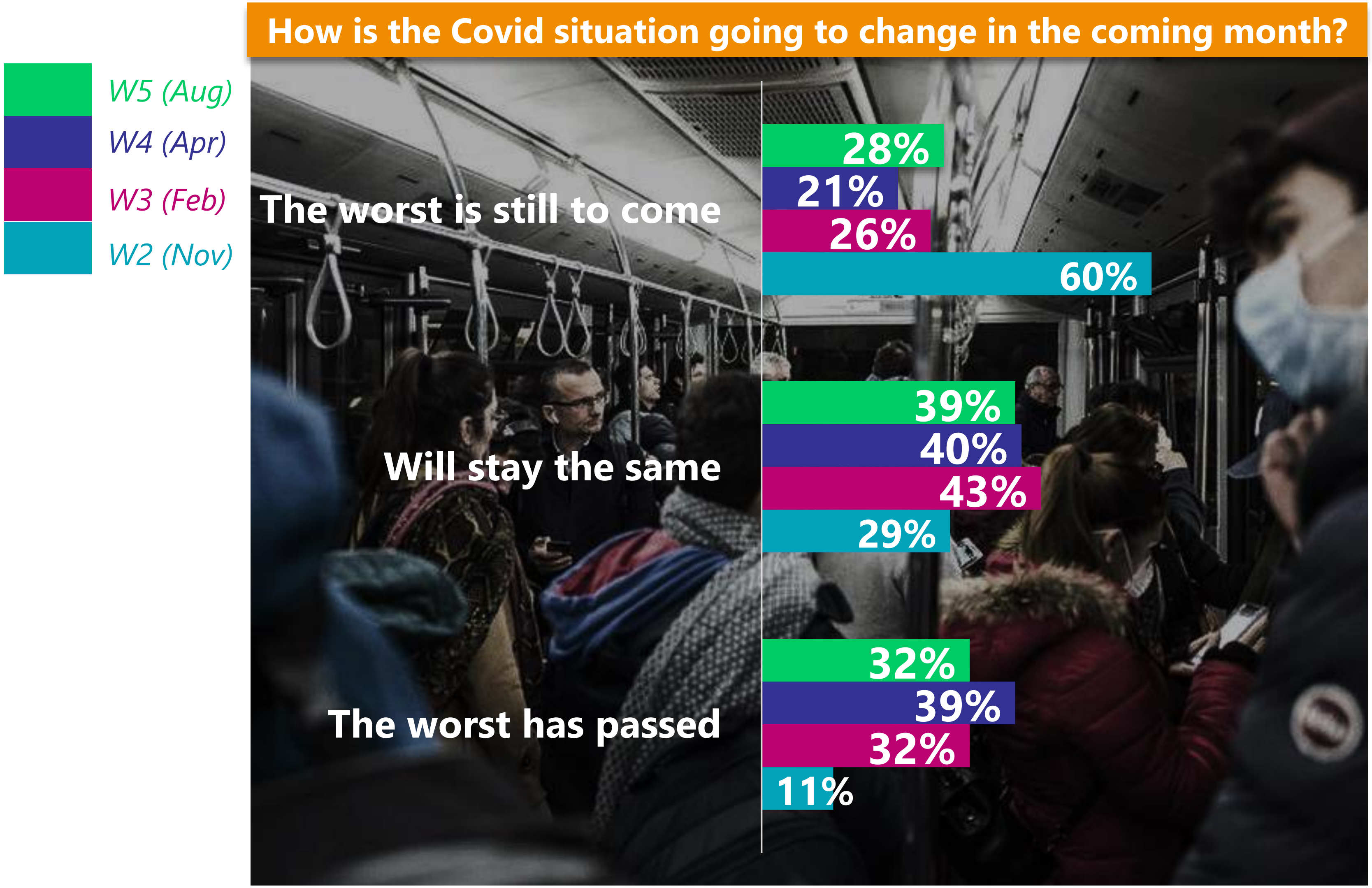
- NI still seen as safest place to travel in, but safety score drops to 70% - ROI up to 61%
- While there is pent-up demand (58% haven't travelled in 2021) Covid-security assurance is crucial to get people to travel at all

Good volume of trips across types to be expected in Sept/Oct

- Dip in travel intentions within NI vs. W4 – no one clear reason for this but may be explained by post-summer lull and growth in cases
- Expected volumes are sizeable nonetheless – 15% considering longer breaks

Covid-19 and Tourism

Increase in number who think the **worst is still to come** – particularly with family segments – cautious messaging key



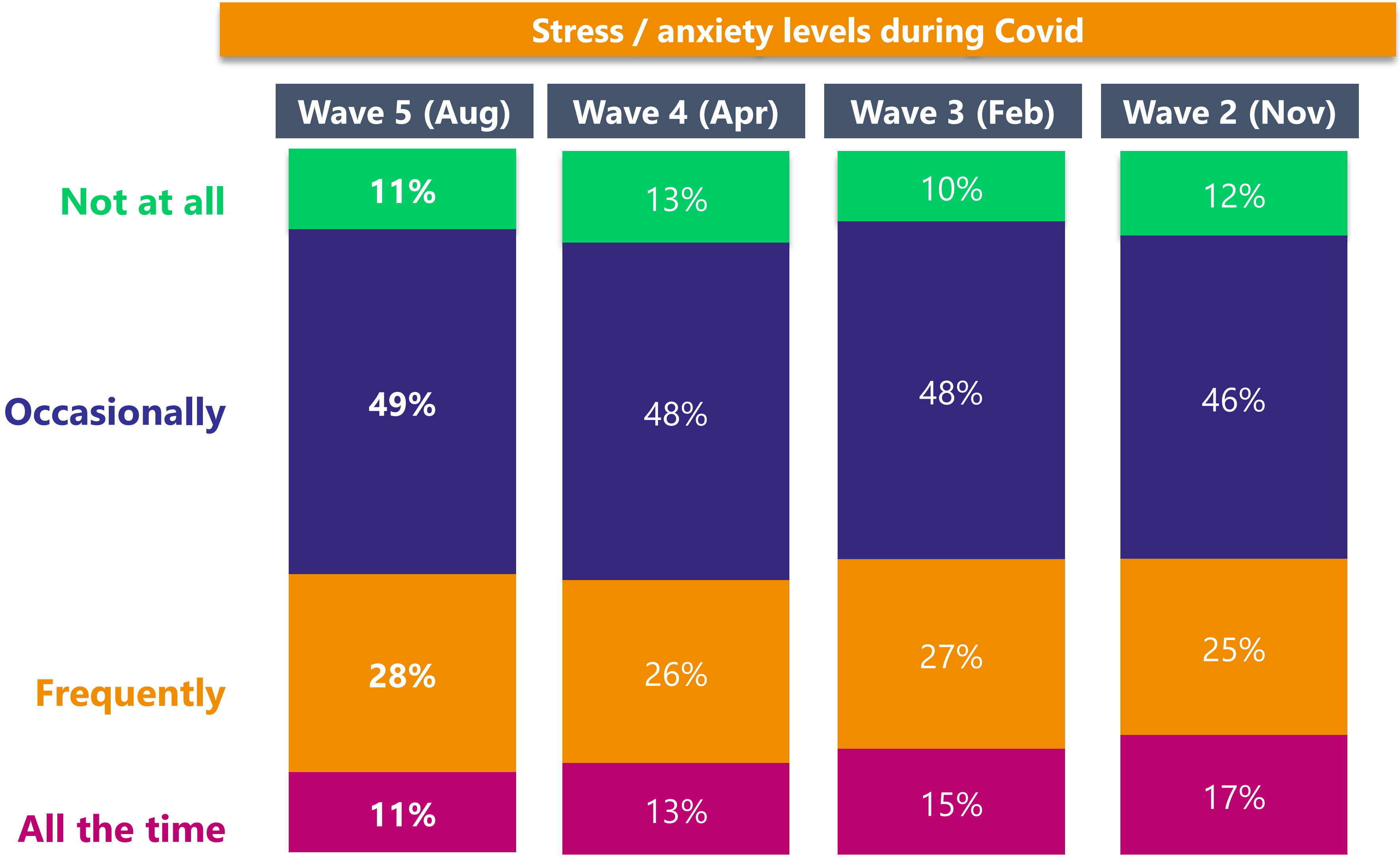
More negative outlook among **35-54s** (36%) and **mid/older families** (35%)

More positive outlook among **males** (38%)

Base n = 400

A1a. Regarding the situation of Coronavirus/Covid-19 in Northern Ireland and the way it is going to change in the coming month, which of the following best describes your opinion?

Levels of anxiety stable with 2 in 5 anxious ‘frequently’ / ‘all the time’ during Covid – mindset yet to shift



Base n= 400

A1b. How would you describe your stress and anxiety levels during Covid-19?

Market Comparison

Covid-19 & Tourism

Neither market out of the woods – but NI sees more growing anxiety than ROI

More of a sense in NI that things are getting worse rather than better

43% in ROI say the worst has passed vs. 32% in NI (W4: ROI 34%, NI 39%)

Covid anxiety relatively stable in both markets – NI tourism industry should continue with cautious, Covid-secure messaging

36% in ROI say they have been feeling anxious frequently (down 2% vs W4), NI 40% (up 1%)

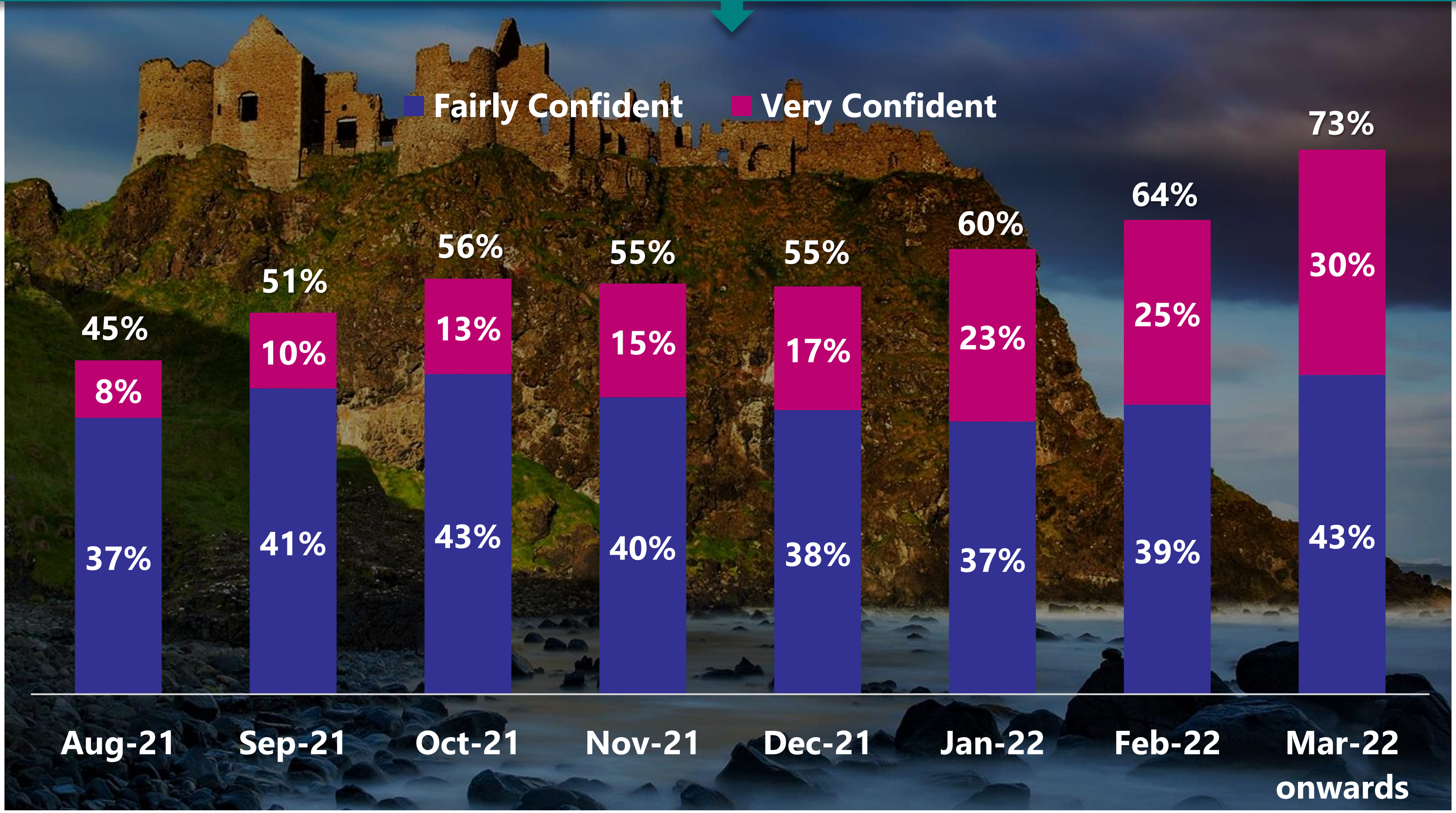
Current Attitudes towards Travel

Confidence in trips not being cancelled increases from October onwards – **expect bookings to pick up from this time**

51%
would be confident in a holiday on IoI in September of this year

In W4 research conducted in April, **26%** were confident they could travel at that point and **68%** said they would likely be confident by September

How confident are you that you would be able to go on a holiday on the Island of Ireland in…



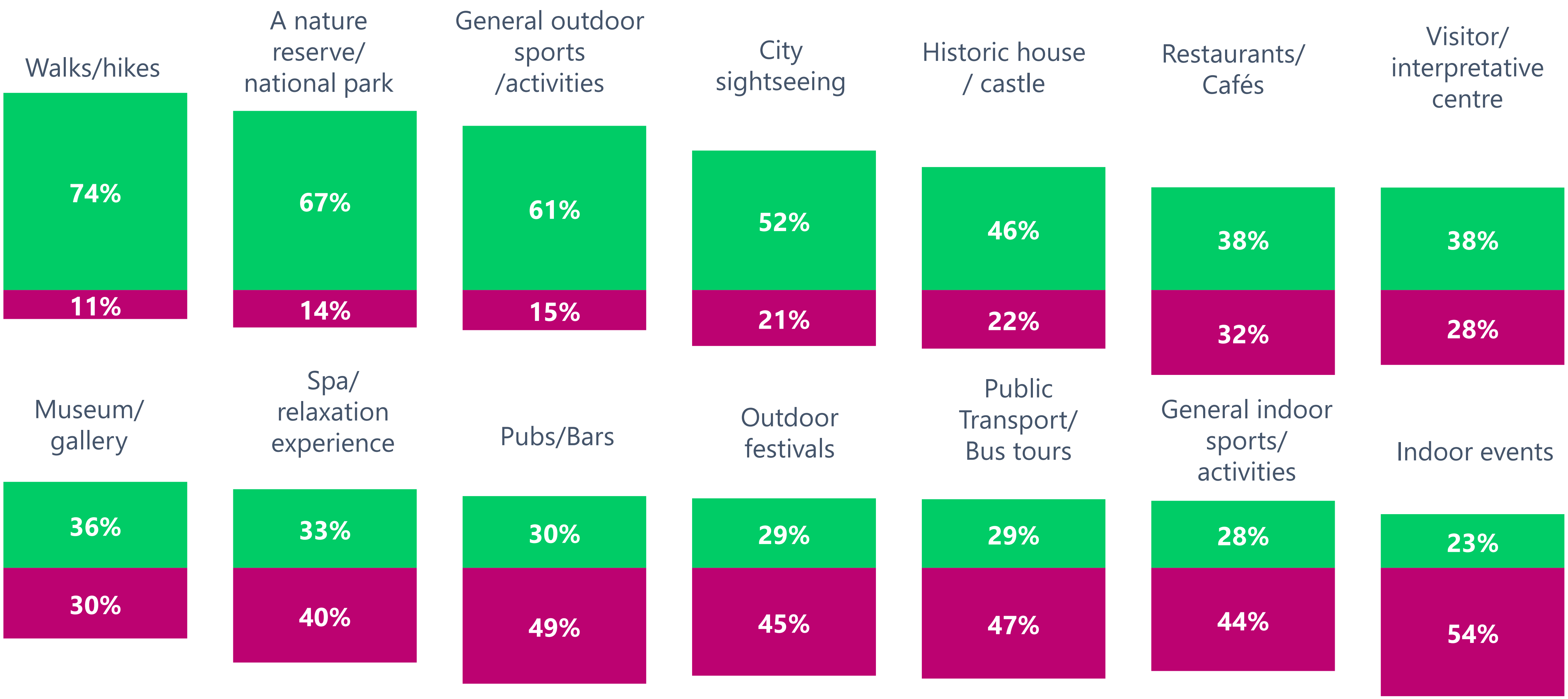
Base n= 400

B3. How confident are you that you would be able to go on a holiday or short break on the island of Ireland in the following months (i.e. you won't have to cancel)?

Focus should be kept on **outdoor events and activities** for now – 'at ease' scores dip slightly in line with Covid case increase

Ease in engaging with activities this summer

At Ease
Nervous



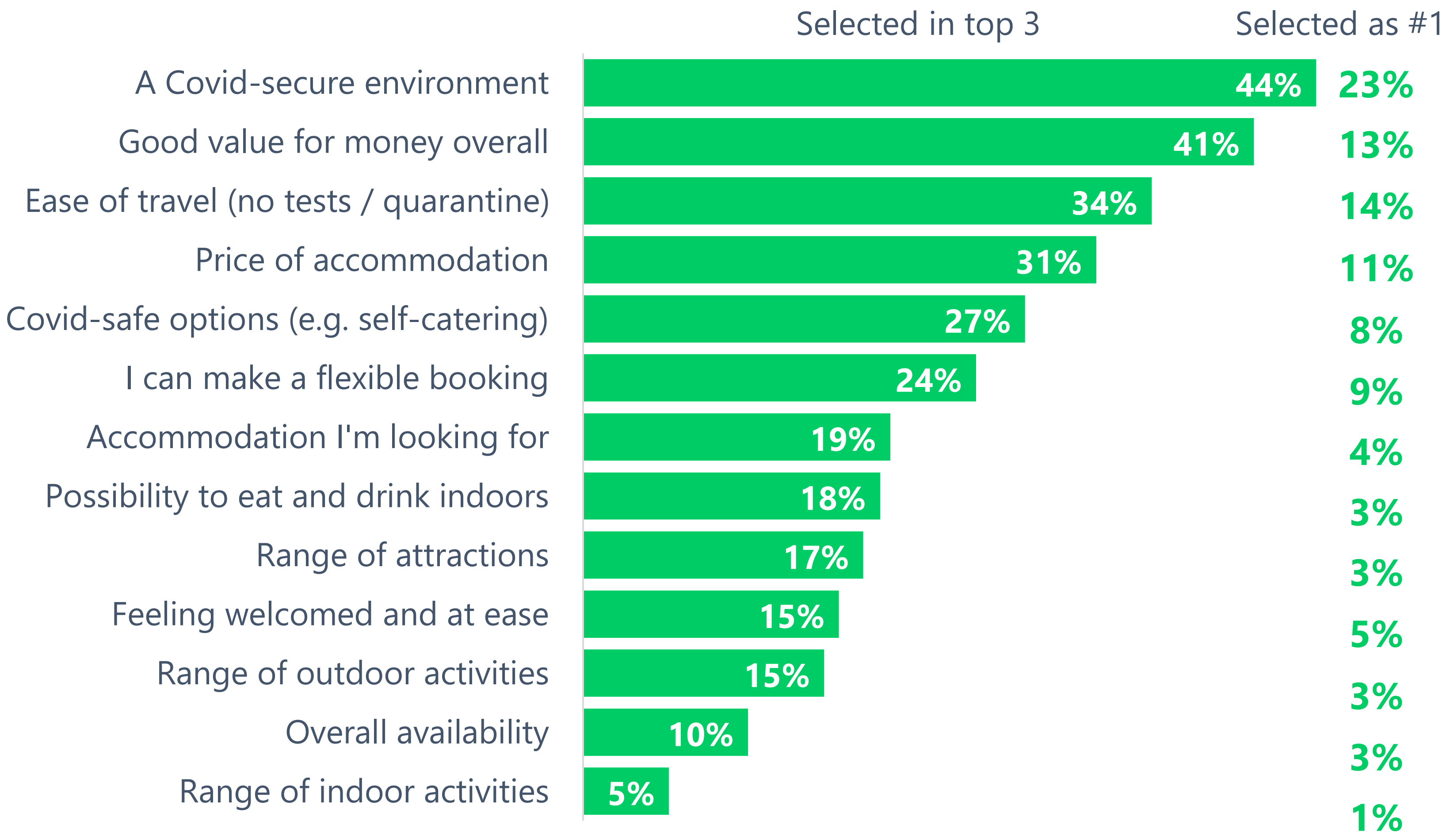
In general scores down slightly vs. W4 – likely reflects growing unease at Covid situation

Base n= 400

B4. How do you currently feel about engaging in these activities this summer (i.e. August – September)?

Covid security, the key decision factor with value for money secondary – so a NI staycation should be an easy choice

Most important factors when it comes to holiday destination



Older, no kids more likely to select **Covid security** (55%)

Pre-/young/mid family more likely to select **range of attractions** (24%)

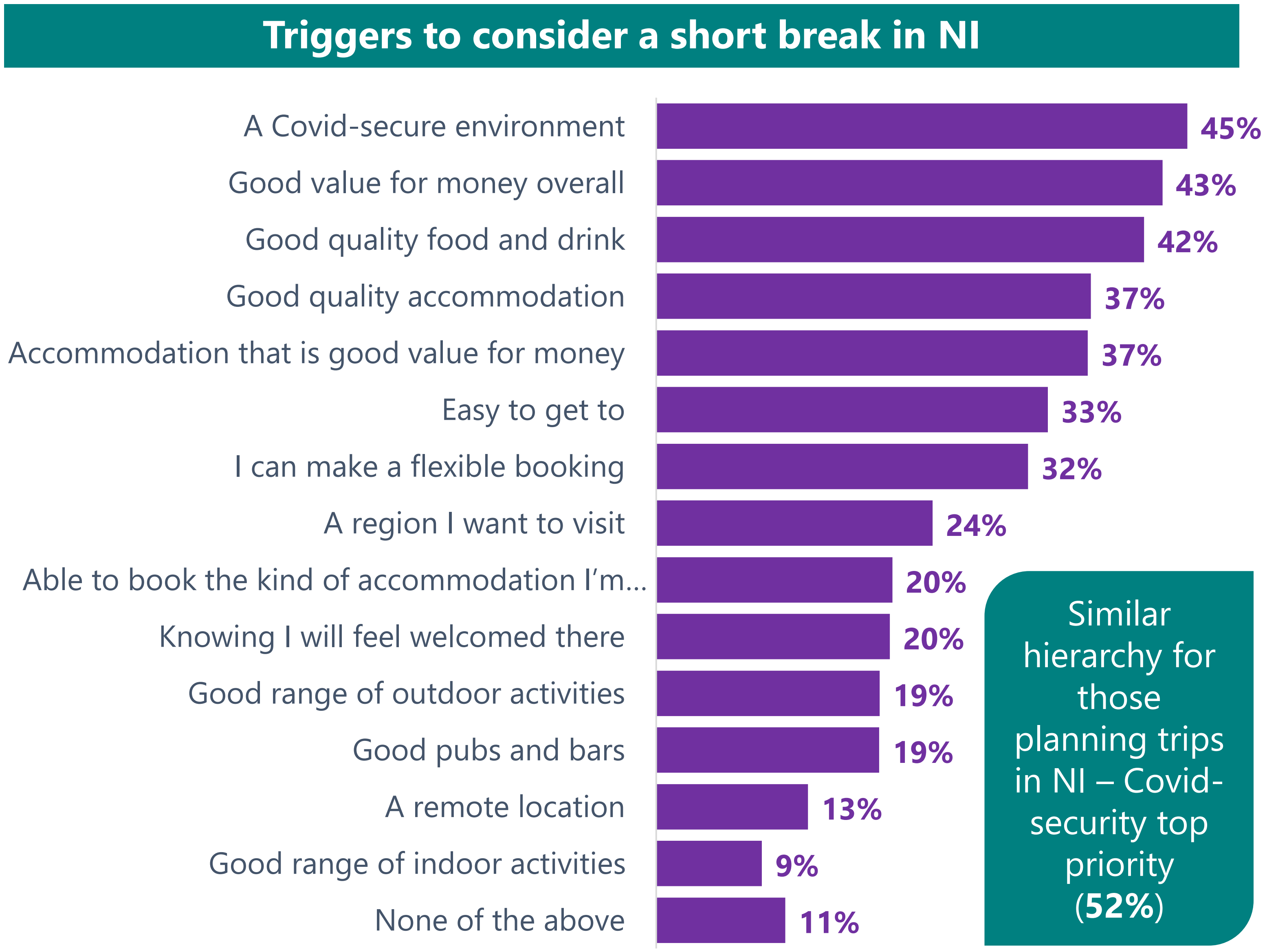
For those planning a trip in NI, **Covid-security** still the number one factor (**21%**) followed by flexible bookings (**13%**)

Base n = 400

B6. Thinking about when you are choosing a destination for a holiday or short break this year, please select the three factors which are most important to you

Covid security and VFM top on NI triggers – but **quality** also very important to NI residents considering NI as a destination

Playing up quality of food/drink and accommodation should drive staycations



Similar hierarchy for those planning trips in NI – Covid-security top priority (**52%**)

Base n = 400

B7. Which, if any, of the following would make you more likely to consider a short break in Northern Ireland this year?

Market Comparison

Current Attitudes towards Travel

ROI residents now more confident about travelling than NI residents

62% of ROI residents are confident that a domestic booking won't be cancelled in Sept – this drops to 51% in NI, a reversal of W4 scores

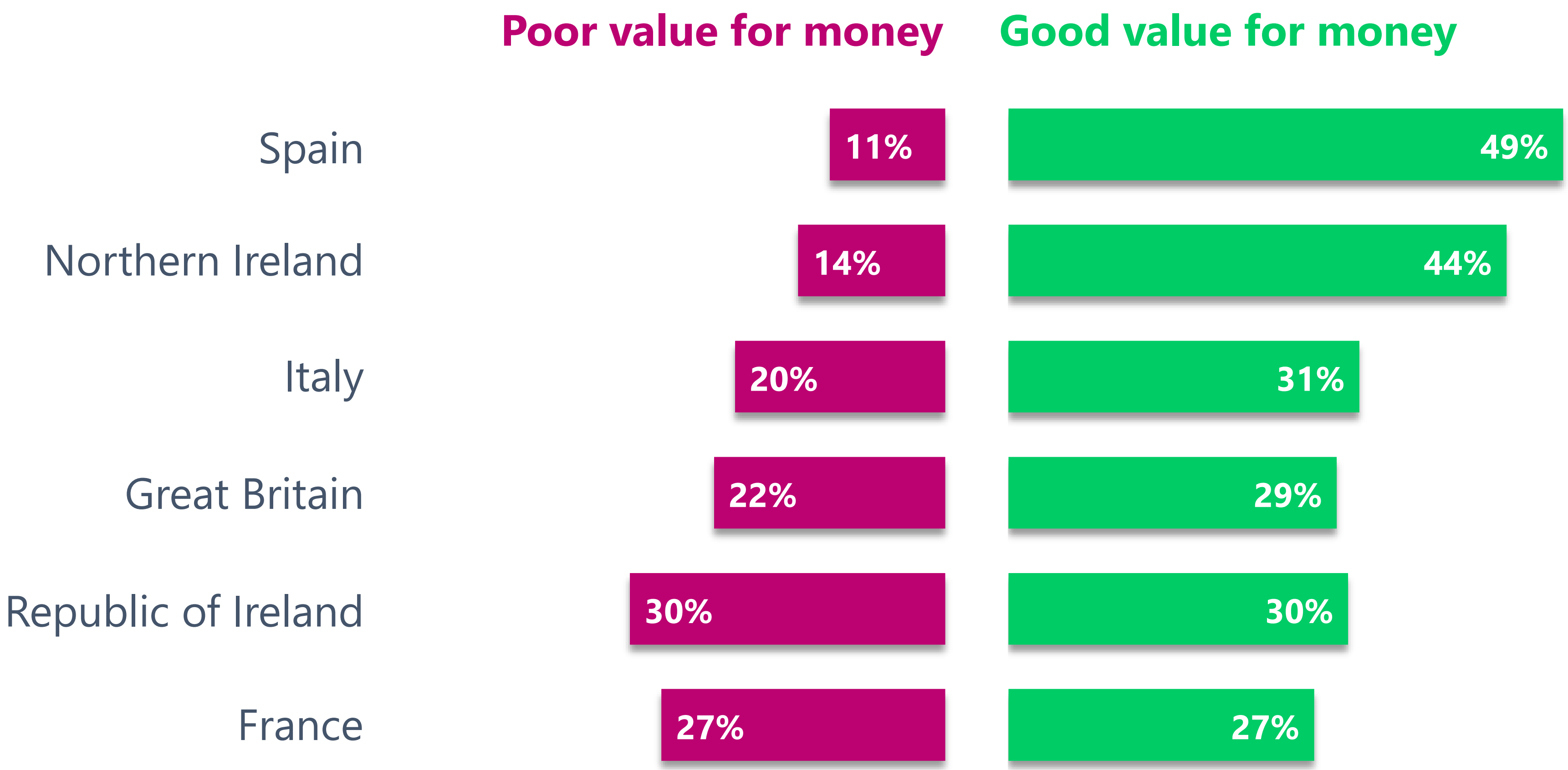
Quality a more important consideration for NI residents – especially food and drink

Quality food and drink (42%) and accommodation (37%) more important to NI residents when considering NI than ROI residents (29% and 34% respectively)

Value for Money

NI value for money perception is strong vs. competitors, not damaged by Covid – **continue to leverage this**

Value for money



Net Score

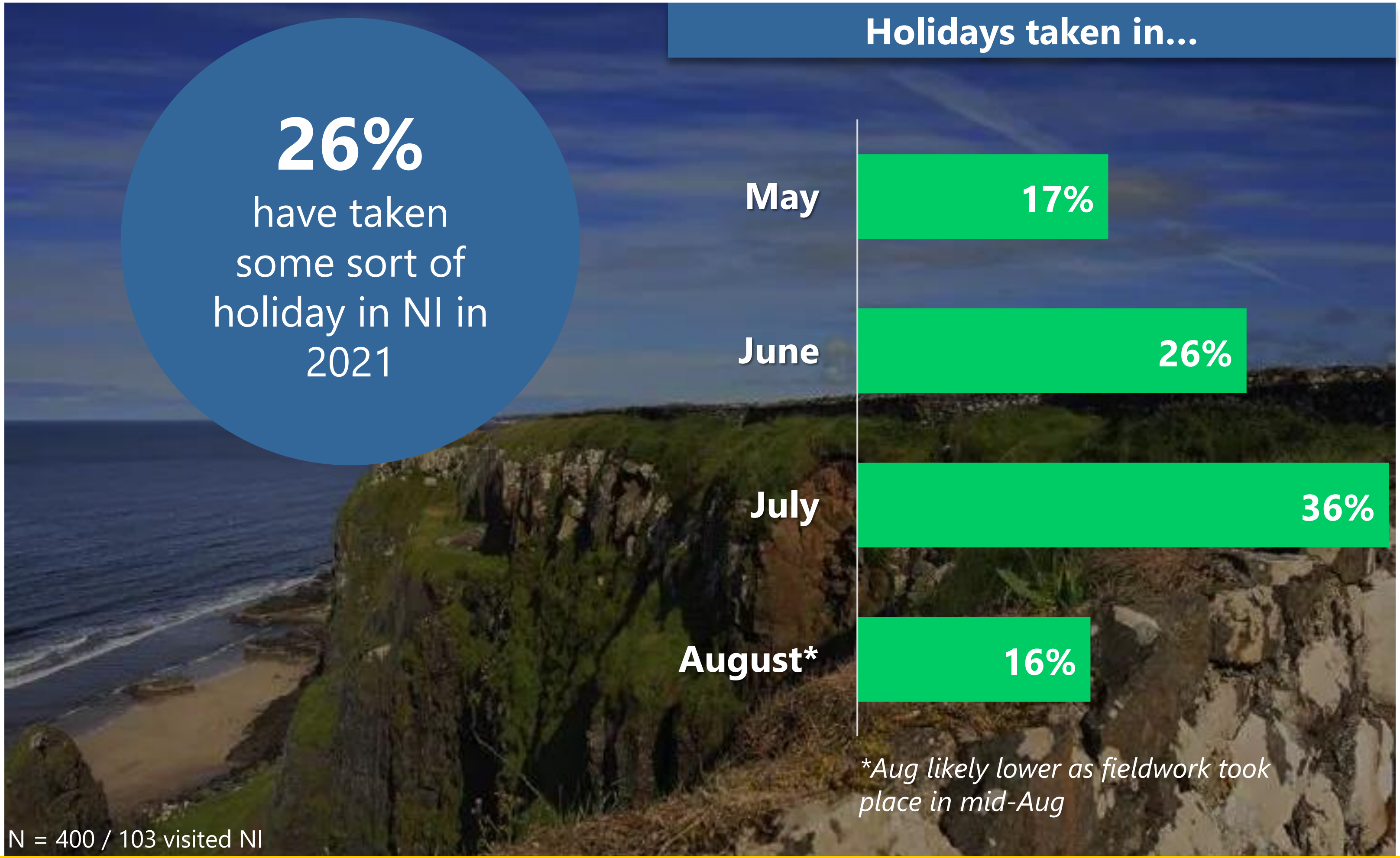
	Aug	Apr	Nov
Spain	+38	+39	+29
Northern Ireland	+30	+23	+33
Italy	+11	-3	-1
Great Britain	+7	+3	+15
Republic of Ireland	0	-14	+1
France	0	-11	-7

N = 400

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

Travel experiences of NI in 2021

26% took a trip in NI in 2021, predominantly in July – although 3 in 5 did not travel at all - expect this to create **pent-up demand**



Other than NI...

- **15%** took a break in ROI
- **11%** went abroad
- **58%** didn't travel at all

D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes in 2021? / D3. And when did you take your holiday(s) or short break(s) in Northern Ireland in 2021? / D4. Was this your first time taking a holiday or short break in Northern Ireland for leisure purposes?

Trip satisfaction is high, particularly with accommodation and hospitality – expectations met across the board but room to **lift NPS** score to exceed them

How trip stacked up to expectations

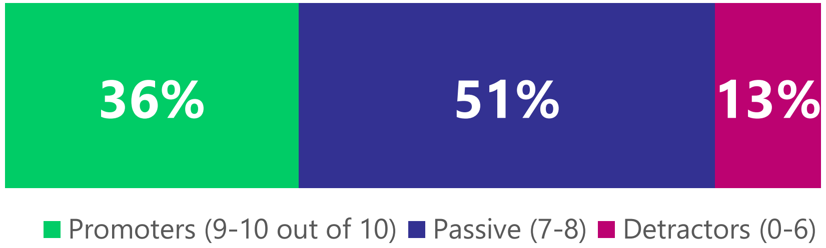
54% said their trip **exceeded expectations**

42% said their trip **met expectations**

4% said their trip **didn't meet expectations**

Net Promoter Score

NPS: **23**



**NPS is calculated as the % of promoters minus detractors – anything above 0 is a good score. 23 slightly weaker than ROI (driven by no. giving 7 or 8) score but still a strong score that reflects well on NI*

Reasons for strong scores (8+ out of 10)

"*Castle Ward is a great way to learn some history and be in the great outdoors*

I visited Cushendall, a seaside town. The beach is so wonderful there [...] We walked to the beach each day and swam in the ocean

Northern Ireland has a lot of great locations, hotels, restaurants and attractions that a lot of people don't know about. Even I, having lived here all my life didn't know about some of them!

Great hotel, lovely rooms and plenty to see and do"

Base n = 103

D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations? / D6. Thinking about your trip(s) in Northern Ireland, how likely are you to recommend it as a holiday destination to friends or family?

Covid security and accommodation availability score strongly – **good signs** re persuading those who are more nervous about Covid to travel within NI

Base n = 103

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

Market Comparison

Travel Experiences

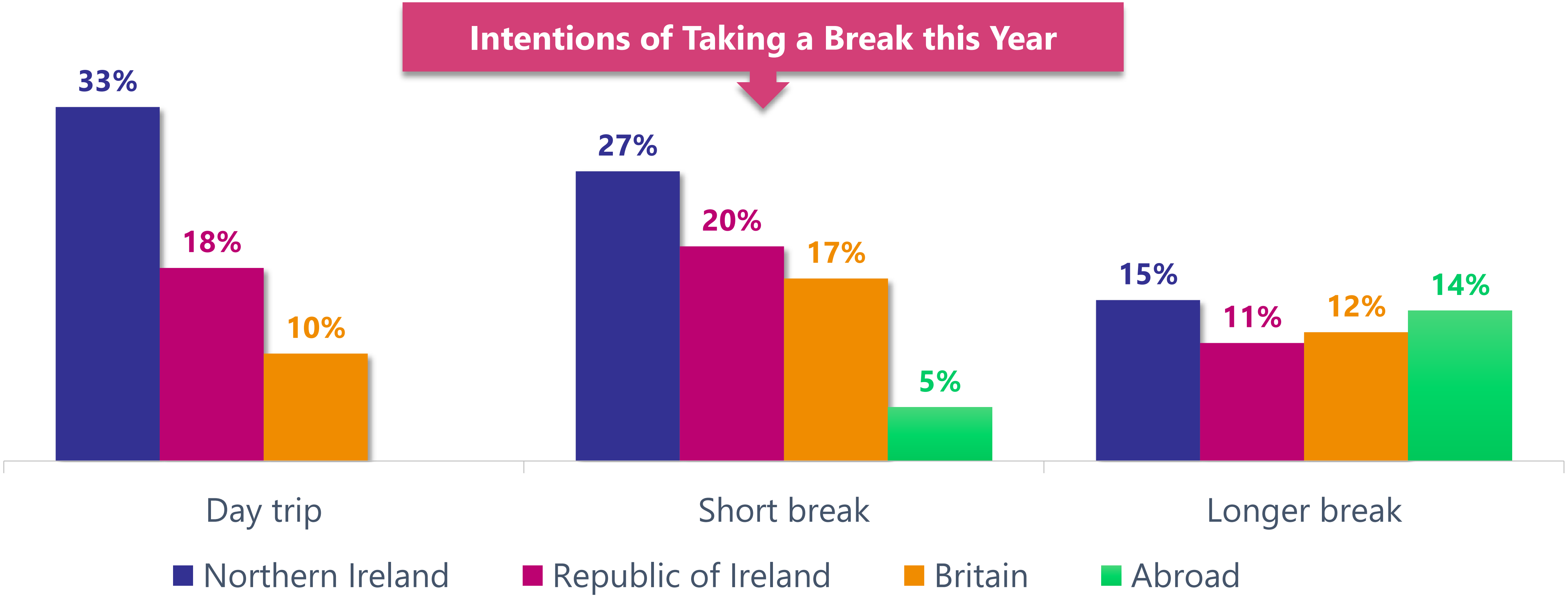
NI residents less likely to have taken a trip in 2021
– 58% had not travelled vs. 52% ROI

NI residents give significantly higher scores when it comes to Covid security – may have lower expectations

Covid security of break ranked joint-first for NI, second-last for ROI

Travel Intent

Many considering day trips & short breaks within NI (and to a lesser extent ROI) this year – **good to focus on these**



Base = 400

Multiple Questions

Dip in break consideration may be explained by end of summer / rise in cases – still **healthy volumes** expected, especially long breaks

Intention on taking a break in Northern Ireland in next 3 years

49% Leisure day trip

42% Short break

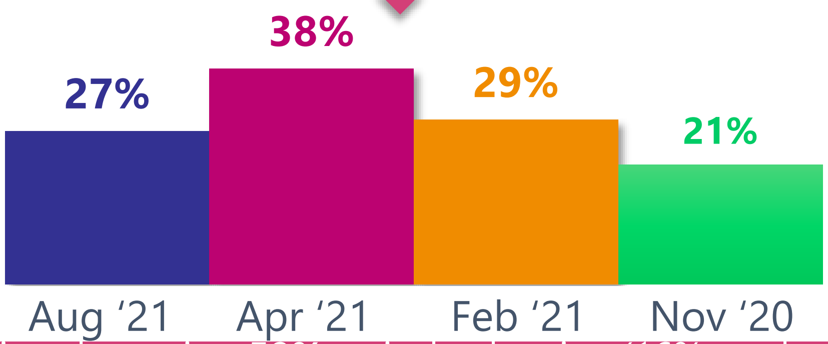
24% Long break

Consideration of break in Northern Ireland in next 3-4 months
(slightly different to prev waves: 'intention of break this year')

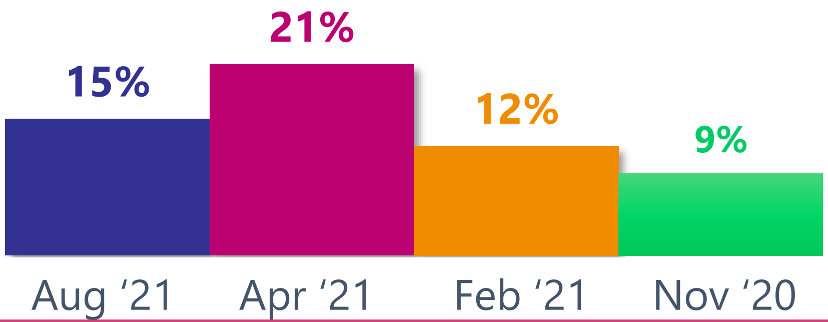
33% planning leisure day trip

Base (n) = 400

Short Break in NI



Long Break in NI



Of those planning short trips, **59%** actively planning (16% total sample)
Short trip intentions higher with **Social Instagrammers** (37%) and **Aspiring Families** (32%)

Of those planning long trips, **60%** actively planning (9% total sample)
Short trip intentions higher with **Social Instagrammers** (22%) and **Aspiring Families** (22%)

E1a. Do you intend to take any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3 years? / E1a. Do you intend to take any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3 years? / E1b. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in the next 3-4 months? / E1c. 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 the next 3-4 months? / E1d. Would you consider taking a longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland or elsewhere abroad in the next 3-4 months?

Short break plans focus mainly on September and October – time to start thinking about **Christmas shopping** messaging?

Note: Previous waves assessed **intent** rather than **consideration**

N = 400

27% considering taking a short break in Northern Ireland

W4: 38% W3: 29% W2: 21% W1: 25%

How much of your short trip have you planned?

N =108

I have booked	Actively planning	Intend to start planning later	May or may not plan
22%	37%	27%	14%

59% are actively planning a trip to NI – 16**%** of the total sample

N =108

*Consideration of short breaks to Northern Ireland in:

September	October	November	December
30%	**27%**	**18%**	**15%**

21% don't know

**Respondents could be intending on going on more than one trip*

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3-4 months? / 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?

Lower number **actively planning** long breaks with a focus on October – **this year we don't have to cancel Halloween**

Note: Previous waves assessed **intent** rather than **consideration**

N = 400

15% considering a long break in Northern Ireland

W4: 21% W3: 12% *W2: 9% W1: 12%*

How much of your longer trip have you planned?

N = 60 – caution low base size

I have booked	Actively planning	Intend to start planning later	May or may not plan
18%	42%	23%	17%

60% are actively planning a trip to NI – 9**%** of the total sample

N = 60

***Consideration of <u>longer breaks</u> to Northern Ireland in:**

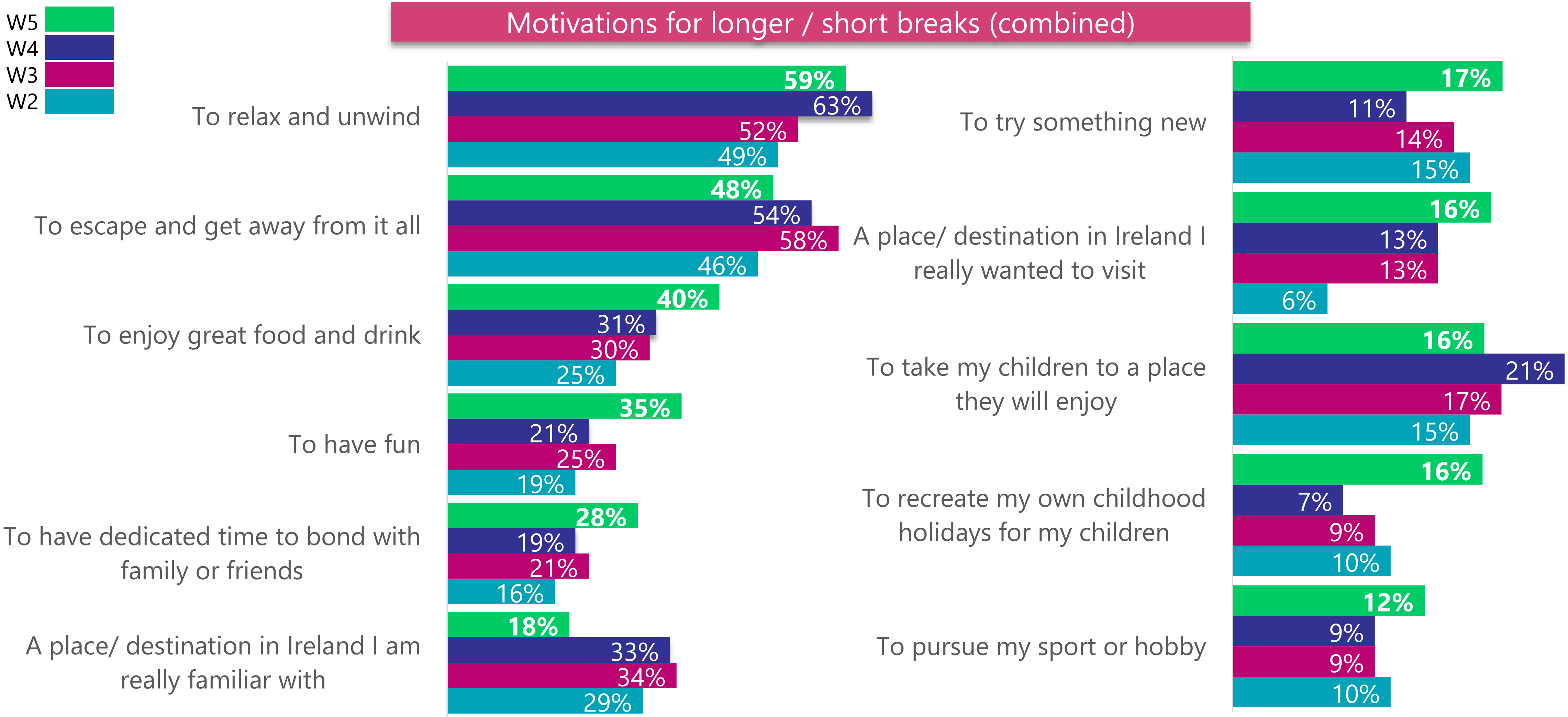
September	October	November	December
21%	37%	20%	14%

24% don't know

**Respondents could be intending on going on more than one trip*

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3-4 months? / 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?

Relaxation still key motivation and should be focus for messaging but growth in interest in **food and drink** - make sure to incorporate this



Base = 107

E4. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the short trip?

Most book **1 month + before holiday**, soon after they start researching – indicates **good knowledge** and **confidence** trip won't be cancelled

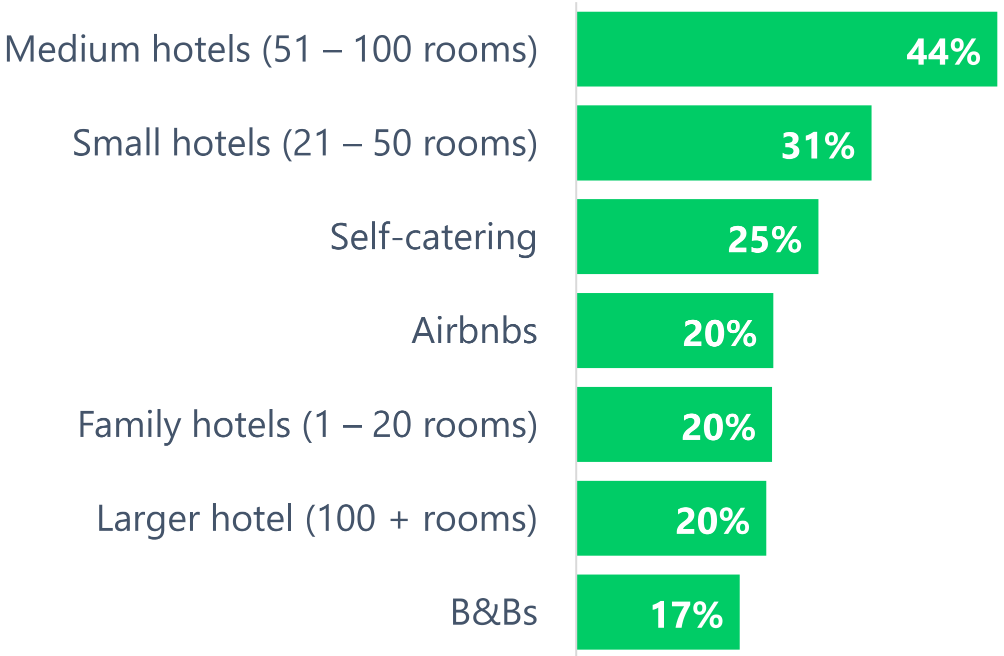
When researched / booked

	Started researching	Booked
Less than a month before	36%	39%
1-2 months	34%	38%
3+ months	30%	23%

Who travelling with (long & short combined)

- 55% Partner / spouse
- 36% Friends
- 31% Immediate family

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



- Shorter breaks more likely to be with **spouse** (57%), longer breaks more likely to be with **family** (38%)
- Shorter breaks more likely to be in **self-catering** / small hotels; longer breaks more likely to be **medium hotels** or **Airbnbs**

Base = 107 (intend on travelling in NI) / 75 (booked/travelled in NI)

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? / E8. You mention you have taken or booked a holiday or short break for this summer in Northern Ireland. How far in advance of the trip did you...

Still reasonable consideration for breaks abroad for 2021, with most saying they are ‘actively planning’

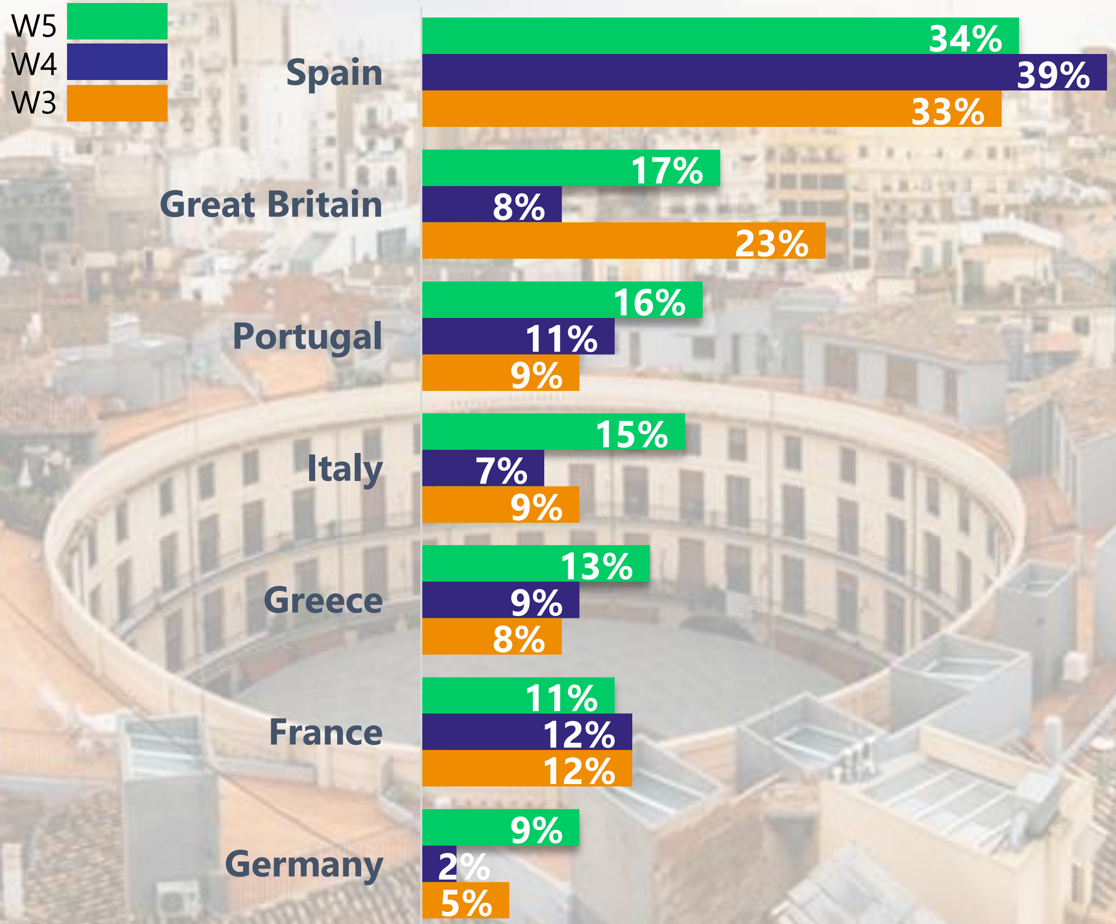
However only 1 in 5 have actually booked – real **hesitancy** still exists

15% of total sample are considering a break abroad in 2021…

57% of this cohort are actively planning or have booked this (19% have booked)

In April, **17%** of total sample were intending on a break abroad

Destination abroad intending on travelling to



Base = 400 / 61 planning trip

E14. You mentioned that you intend on taking a break abroad in 2021, have you booked or thought about planning this trip abroad?/ Q21. Where abroad have you booked/are you planning a trip?

Market Comparison

Travel Intent

ROI travellers to NI booked their trips later than NI residents – worth delving into habits / effect of Covid here

Booked a month beforehand or later: ROI **53%**, NI **39%**

Relaxation by far the key motivator for travelling to NI across both markets – but food/drink becomes a key consideration in NI

ROI residents are more likely to be planning a staycation within ROI than NI residents within NI

Consideration: ROI Residents 57% VS NI Residents 41%

*holiday within your own country

Events

Market Comparison

Events

Not a big difference between NI and ROI residents when it comes to perceived safety of events

NI residents more likely to consider large outdoor events safe (47% vs. 43% ROI) but generally similar view of safety

But NI residents more likely to be considering an event this year

40% of NI residents considering an event vs. 31% of ROI residents – unsurprising with NI further ahead in loosening restrictions