Consumer Sentiment in NI & ROI Covid-19 25 June 2020



tourism northernireland

Failte Ireland consumer sentiment wave research in collaboration with Tourism NI

- Understanding consumer sentiment, behaviours and attitudes in the context of Covid-19
- Running from March through to August
- Sample: ROI: 900/ 1,000 and NI: 300
- Weekly waves now moved to fortnightly/ three weekly
- Data referred to is for the waves conducted between
 29 May and 11 June



The Current Mood

Consumers across both NI and ROI continue to be concerned about Covid-19 and how it is impacting them

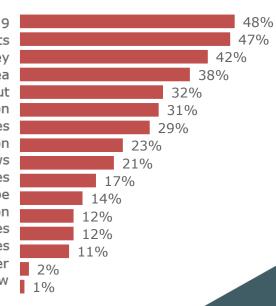
- Unsurprisingly consumer mood has been predominantly negative
- NI consumers are slightly less worried about falling sick than their ROI counterparts
- A third of NI consumers are largely confident in taking the required safety precautions (32%) and over three quarters are carefully adhering to best practice behaviours such as social distancing and appropriate hygiene (78%).





Safety and security are paramount for consumers, closely followed by the cost of accommodation and value for money perception

- Over half of those planning a trip across the island of Ireland do not expect to pay more for their accommodation, hospitality and entrance fees nor are they prepared to pay more
- Safety and security related to Covid-19 Accommodation costs Value for money Attractions in the area Availability of options for eating in / out Ease of travelling to destination Accommodation choices Ease of travelling within destination Reviews The range of outdoor activities How popular or busy the location will be The remoteness of the location Availability of specific leisure activities The range of indoor activities Other Don't know







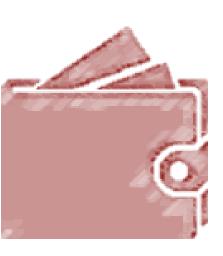
The Current Mood

The Financial Impact of Covid-19

The pandemic is having a significant financial impact on the majority of people in both NI and ROI

- Across the island of Ireland over 2/3 of households have already experienced a loss of income or expect to in the future
- In NI there has been an increase in early June in terms of those impacted – 57% to 66%
- Nearly three out of 10 (28%) in NI state that Coronavirus will have no impact on their household income with the 65+ age band and those in higher socio-economic groups state are less impacted than average
- Value for money will therefore be important in consideration

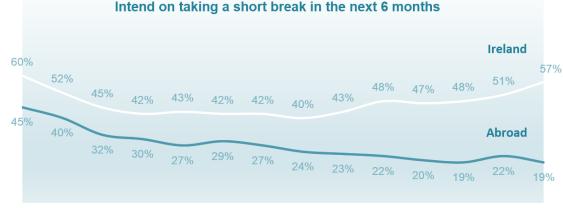




Travel Intentions – short breaks

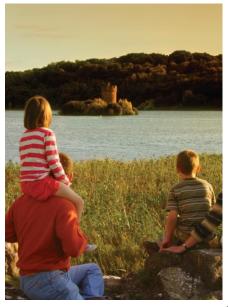
Now that clear road maps have been laid out in both NI and ROI and restrictions are planned or have already been lifted, people are starting to think about holidays closer to home

 Short break intention has picked up over the end of May into early June from 51% to 57% of consumers across the Island of Ireland now planning a trip in Ireland in the next six months



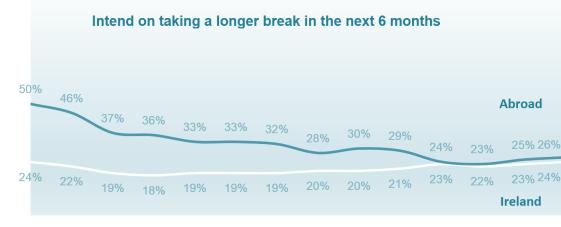






Travel Intentions – longer breaks

- By comparison, intentions for longer breaks show no significant movement household finances/ decisions made on sun holidays
- Whilst there is a lack of international bookings this has not been replaced with longer holiday booking intentions in Ireland
- Many people are extending their short breaks from 2/3 nights to 4 nights.



Ż

tourism

northernireland

11 March

11 June

Consumers indicate that August and September are when they'd most likely take a short break – the shoulder season is also being considered

- However, of those who intend to take a break 4 out of 5 haven't booked yet
- Typically planning 1-2 leisure trips in the next six months – no apparent impact for not being able to take a break since March
- Adults <45 years with no children are more likely to travel (particularly abroad)
- Of those considering a short break in Ireland, two out of five in NI plan to do this in the next six months in NI – Aug/ Sept
- One in nine from ROI
- Shoulder season months October and November are also being considered









After lockdown and movement restrictions, the most important reasons for taking either a short or long trip for consumers in NI and ROI are

To relax and unwindTo escape and get away from it allTo have funTo enjoy great food and drinkTo have dedicated time to bond with family or friendsA place/ destination in Ireland I really wanted to visitTo take my children to a place they will enjoyA place/ destination in Ireland I am really familiar with10%To pursue my sport or hobby5%To recreate my own childhood holidays for my children3

Consumer Needs







What will they want to do?

For those who intend to take a short trip in NI or ROI, 'escaping to the country' and historical and cultural visits are high on the list

Walking / hiking	51	5
Visit a nature reserve/ national park	48%	
Visit a historic house/castle	43%	
Visit gardens	41%	
Swimming (in a pool / lake / sea)	36%	
Visit a visitor centre / heritage/interpretative centre	29%	
Visit a farmers' market/food producer	27%	
Visit a museum/gallery	24%	
Cycling	15%	Contrast of
General outdoor sports (e.g. golf, tennis etc)	14%	
Visit an outdoor adventure parks	13%	
Water based activities (surfing, diving, kayaking, canoeing, kite surfing etc.)		
Sailing / boat trips	7%	





northernireland

tourism

How NI consumers feel about engaging in the following activities in the up-coming weeks:

	Nervous/	At ease/ completely
	very nervous	at ease
Working Outside The Home	27%	34%
Shopping (other Than Grocery Shopping)	32%	33%
Going On Holiday In Ireland	37%	33%
Activities Involving Hiring Equipment (e.g cycling, kayaking etc.)	33%	26%
Visiting Indoor Attractions (museum / Gallery etc.)	48%	23%
Going On Holiday Abroad	54%	20%
Eating At Restaurants / Cafés	54%	19%
Going To A Pub / Bar	59%	18%
Using Public Transport	58%	16%
Bus Tours	57%	13%
Going To An Outdoor Festival	56%	12%







Comfort levels

Customers need to feel comfortable

Clear, visible implementation of hygiene measures, limiting numbers and social distancing enforcement are the key actions that would make NI consumers feel most comfortable about visiting attractions when they reopen:

65%	Hand sanitiser at entrance and around the premises
64% Easic requirement	Limiting the number of visitors on the premises at one time
61%	Social distancing queues at the entrance and around the premises
43%	Staff visibly cleaning surfaces, utensils, machinery etc.
34%	All staff wearing masks and gloves
34%	Taking the temperature of all visitors on entering
29%	Making it compulsory for customers to wear masks
26%	Pre-booking times
22%	Maximising distance from staff
20%	Notices around the premises reassuring visitors about cleaning and other measures in place
18%	Hygiene standard certification
12%	Notices on the website about special measures in place on the premises





ents

In summary

tourism northernireland

Consumers across both NI and ROI continue to be concerned about Covid-19 and how it is impacting them – safety and security are paramount

Travel intentions suggest a more optimistic outlook is emerging, particularly in relation to domestic short breaks where over half of NI and ROI consumers are planning a short break in Ireland in the next six months

Booking hasn't followed on from intention just yet

August and September are popular intended months to take a trip – indications are that the shoulder season will be popular

However the pandemic is already having or will have a significant financial impact on the majority of households so 'value for money' is critical especially for families. The cost of accommodation is very important



To escape, relax and have fun are what people simply want to do on their future break – <u>as long as they can do it safely</u>

Communication of how safety and escaping, relaxing and having fun can be combined are key

Reassurance on safety through visible supporting actions as well as underpinning policies are critical - clear, visible implementation of hygiene measures and social distancing enforcement are the key actions that would make NI consumers feel most comfortable

Consumer sentiment research and insights available on

www.tourismni.com

