Tourism Northern Ireland Consumer Sentiment Research

ROI Market – Wave 12 (April 2023)

Research background

Research background & objectives

This is the **12th wave** of our consumer sentiment research for the Republic of Ireland (ROI). We have continued to look at consumer attitudes towards travel in Northern Ireland (NI) and elsewhere, keeping an eye on how pertinent issues will impact on consumer spend and holiday/short break intentions. This wave had a special focus on the NI food & drink experience.

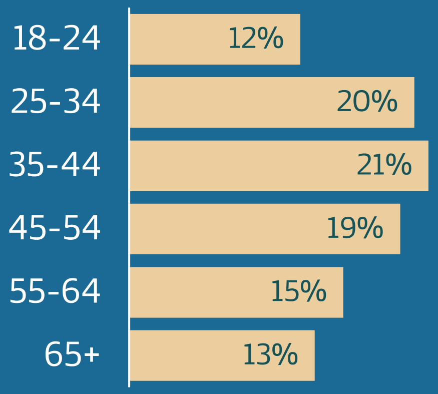
The research objectives:

- Understand recent travel experiences in NI
- Explore current attitudes towards travel
- Assess current attitudes towards travel in NI, ROI and further afield
- Analyse experiences and attitudes of food and drink in NI

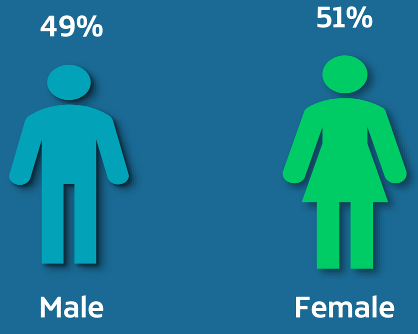
Sample - We spoke to a robust, nationally representative sample in the Republic of Ireland

Full sample n=750

Age

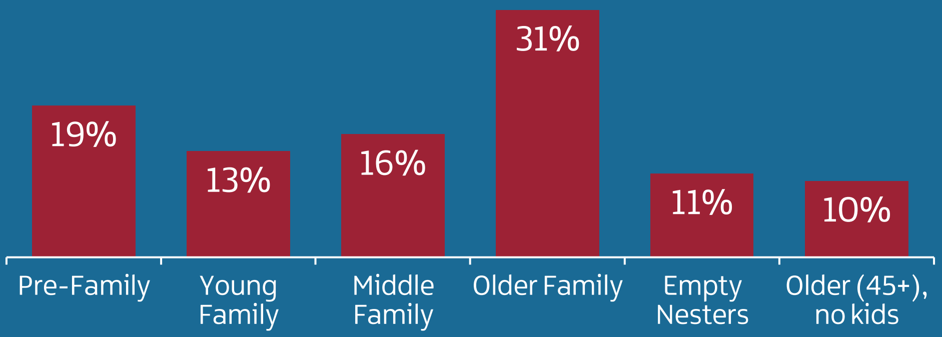


Gender

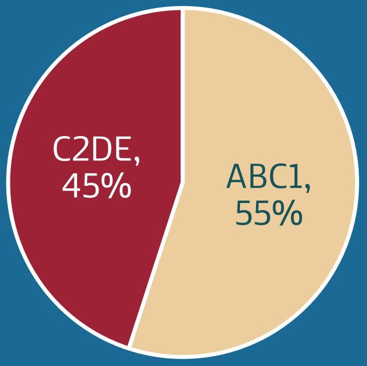


1% describe in another way

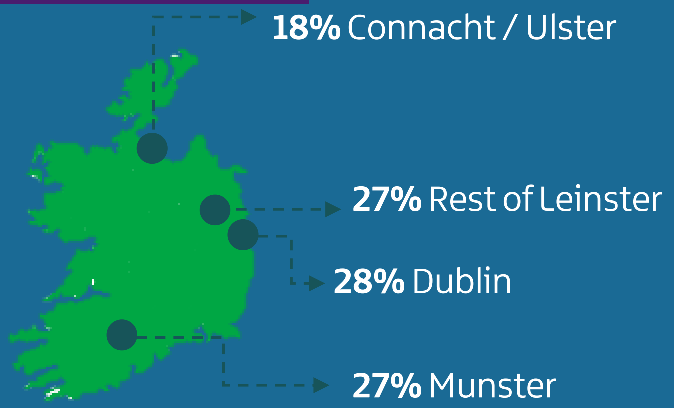
Lifestage



Socio



Region



Fieldwork was conducted between 22 March and 11 April 2023

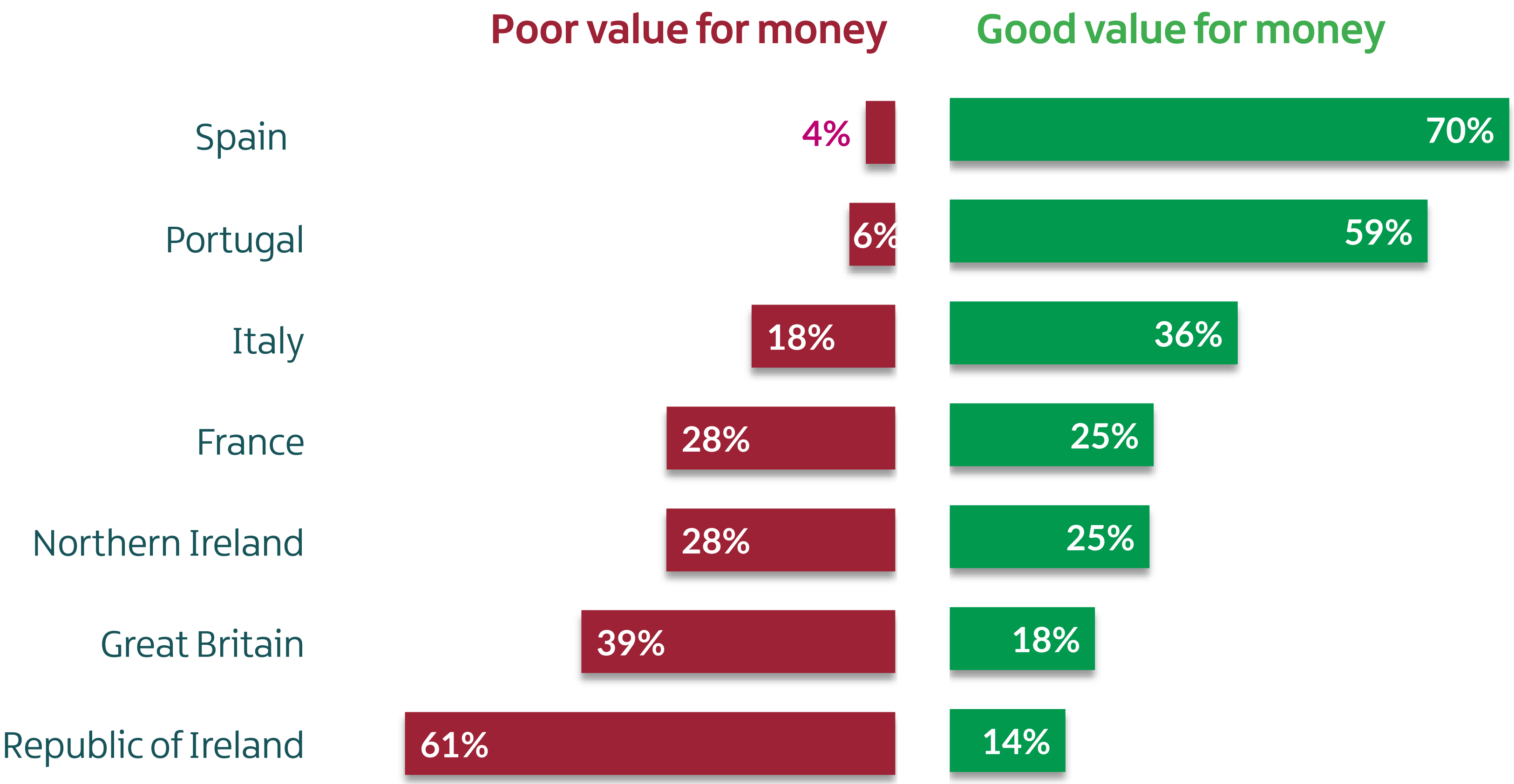
Key takeaways

Short break and day trips intentions on the increase – long trips hit somewhat	- There is an increase in day trip and short break intentions by 4 percentage points and 3 percentage points respectively, for the next three months compared to March 2022 - Compared to last year, long break intentions to Northern Ireland for the next three months have dropped, likely a result of increased comfort with travel abroad
VFM perceptions still high relative to ROI, but those actively researching are noticing costs have increased	- NI continues to be viewed positively by those consumers researching it, particularly when it comes to food and drink, activities, and welcome/ hospitality. Food and drink is also the top motivator for trips to NI - The lowest score among those researching was for value for money (VFM), although 43% of respondents still rated VFM for food and drink and accommodation as excellent to very good. This indicates that those researching have noticed some degree of cost increase – but overall VFM perceptions have improved in ROI after dropping significantly back in October 2022
Trip abroad intentions now reasonably stable – but cost is still a factor	- Three out of five people are planning trips abroad, which is up compared to last year but plateauing compared to the previous wave in late 2022. Trip abroad intentions had been steadily growing since restrictions began to be lifted, so it is likely that COVID-19's impact on trips abroad is now minimal - Among those not planning a trip abroad this spring or summer, cost is the key factor, with 39% of people not taking a trip abroad because of it
Food and drink experience very positive – particularly when it comes to quality	- The Northern Ireland food and drink experience rated very highly by those who've visited, with quality of food and drink and service being among the highest-rated aspects - Most people who have visited Northern Ireland in the last two years have visited restaurants, pubs, and bars for food, with 40% saying that their food and drink experience exceeded expectations, while 50% said it met expectations

Value for money

Value for money score for NI continues to improve wave-on-wave – well ahead of key competitors

Value For Money



Net Score

	Mar	Dec	Oct
Spain	+66	+48	+46
Portugal	+53	+40	
Italy	+18	+12	+11
France	-3	-7	-1
Northern Ireland	-3	-14	-18
Great Britain	-21	-31	-31
Republic of Ireland	-47	-48	-53

N = 750

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

Market comparison – Value for money

Value for money perception improves in both markets

- Net VFM score for NI among ROI residents is -3, an improvement vs previous wave
- **For those in NI this score also improves – now sitting at +11, and has recovered from drop in October – possible sign that concerns around cost increases have dropped somewhat**

Travel experiences

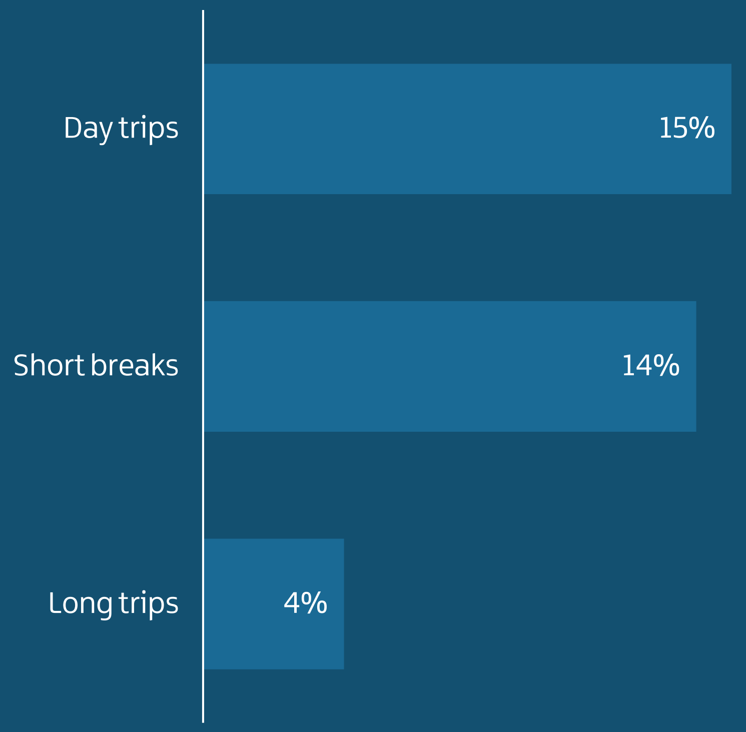
1 in 6 in ROI have taken a break to NI so far this year

16%

have taken a **short or long break** in NI in 2023

49% said they were first time visitors

% of total sample who took...



Other than NI...

38% took a break in ROI

23% went abroad

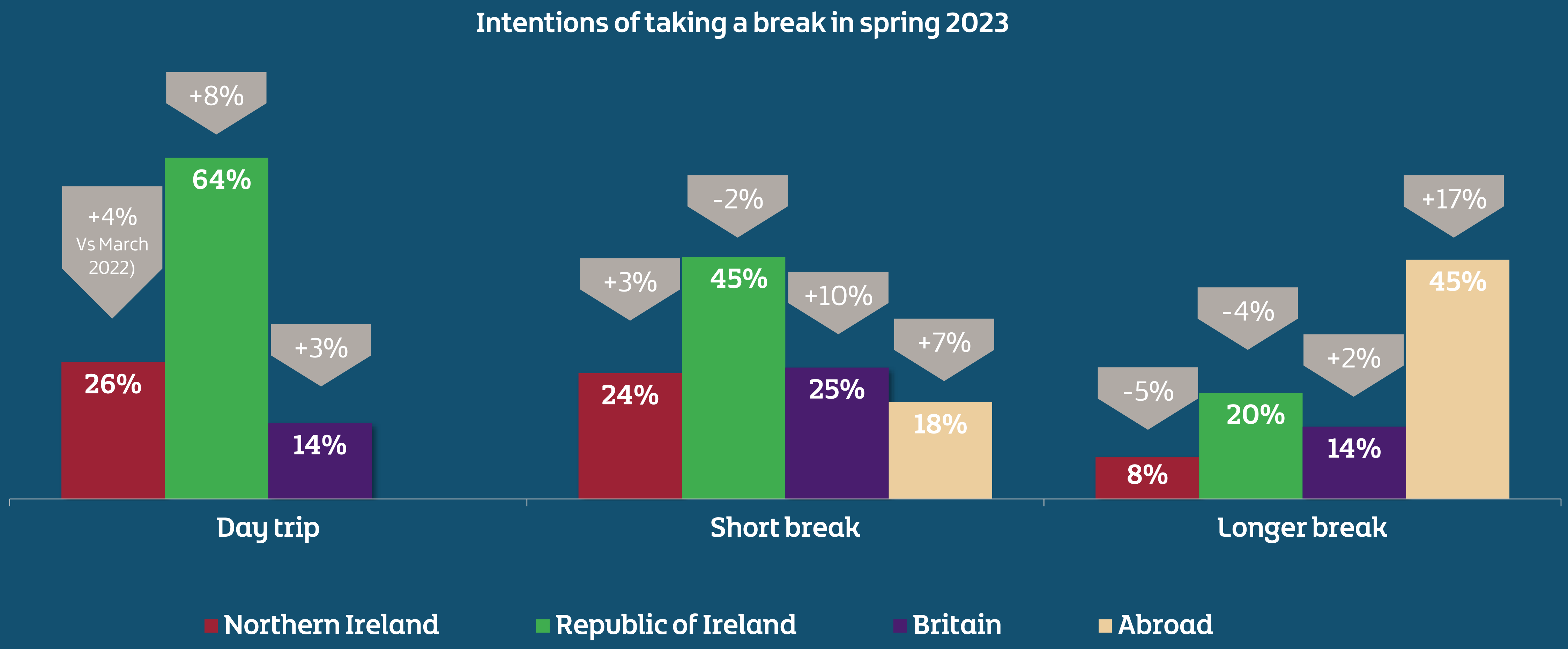
36% didn't travel at all

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 2023?

Travel intent

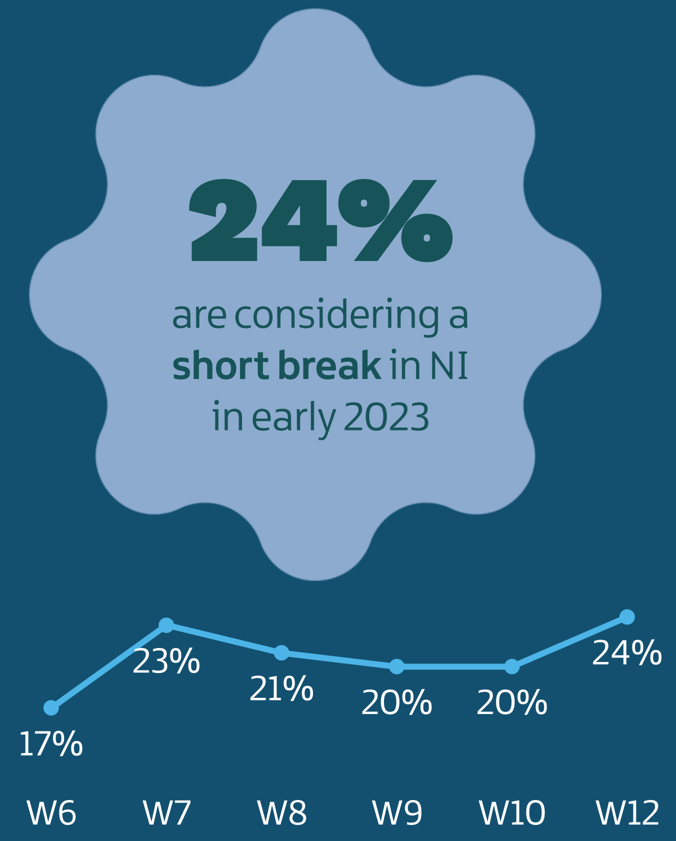
Intentions for day trips / short breaks up for NI vs. this time last year – however long breaks fall back compared to March 2022 as trip abroad intentions increase



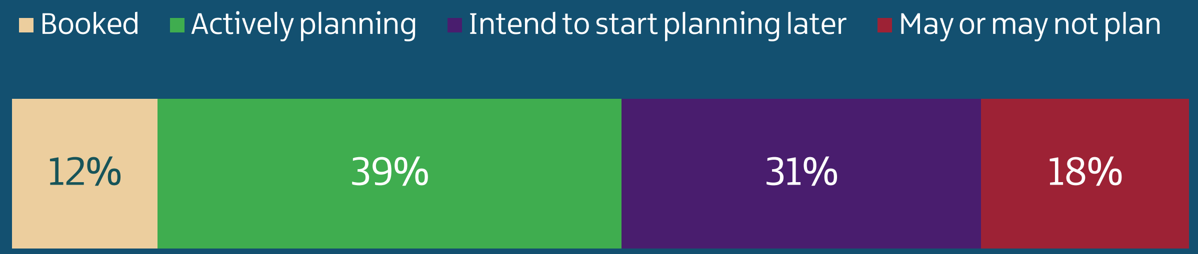
N = 750

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 next 3 months (April to June)?

A quarter considering short breaks in coming months – similar levels to early 2022. Around half actively planning, with June the key time for trips

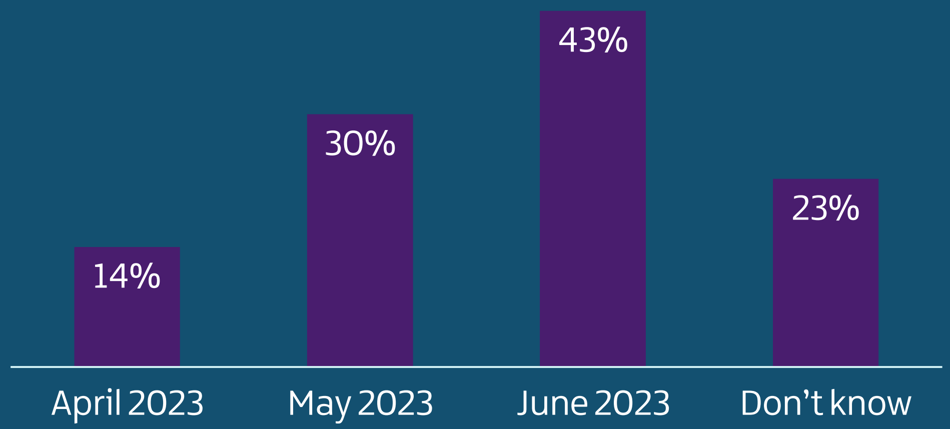


Amount of short break planned



51% are actively planning or have booked a trip to NI – 11**%** of the total sample

Short break planned for



N = 180 considering short break

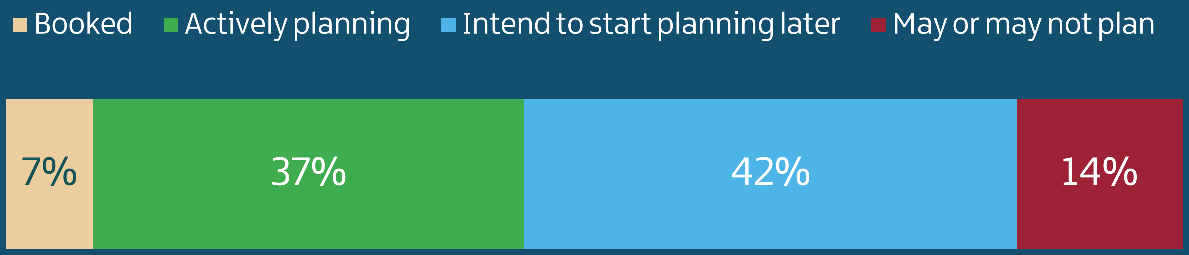
E1b. Would you consider taking a short break of at least 1-3 nights in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in April 2023 – June 2023
E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland / E3. Have you booked or thought about planning this trip in Northern Ireland?

Fewer than 1 in 10 are considering taking a long break in NI in spring / early summer 2023

8%

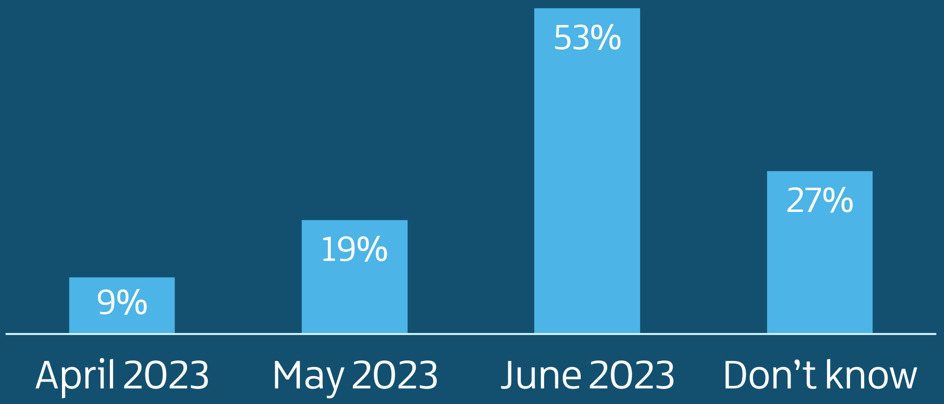
are considering a **long break** in NI in next 3 months

Amount of long break planned



44% are actively planning or have booked a trip to NI – 3**%** of the total sample.

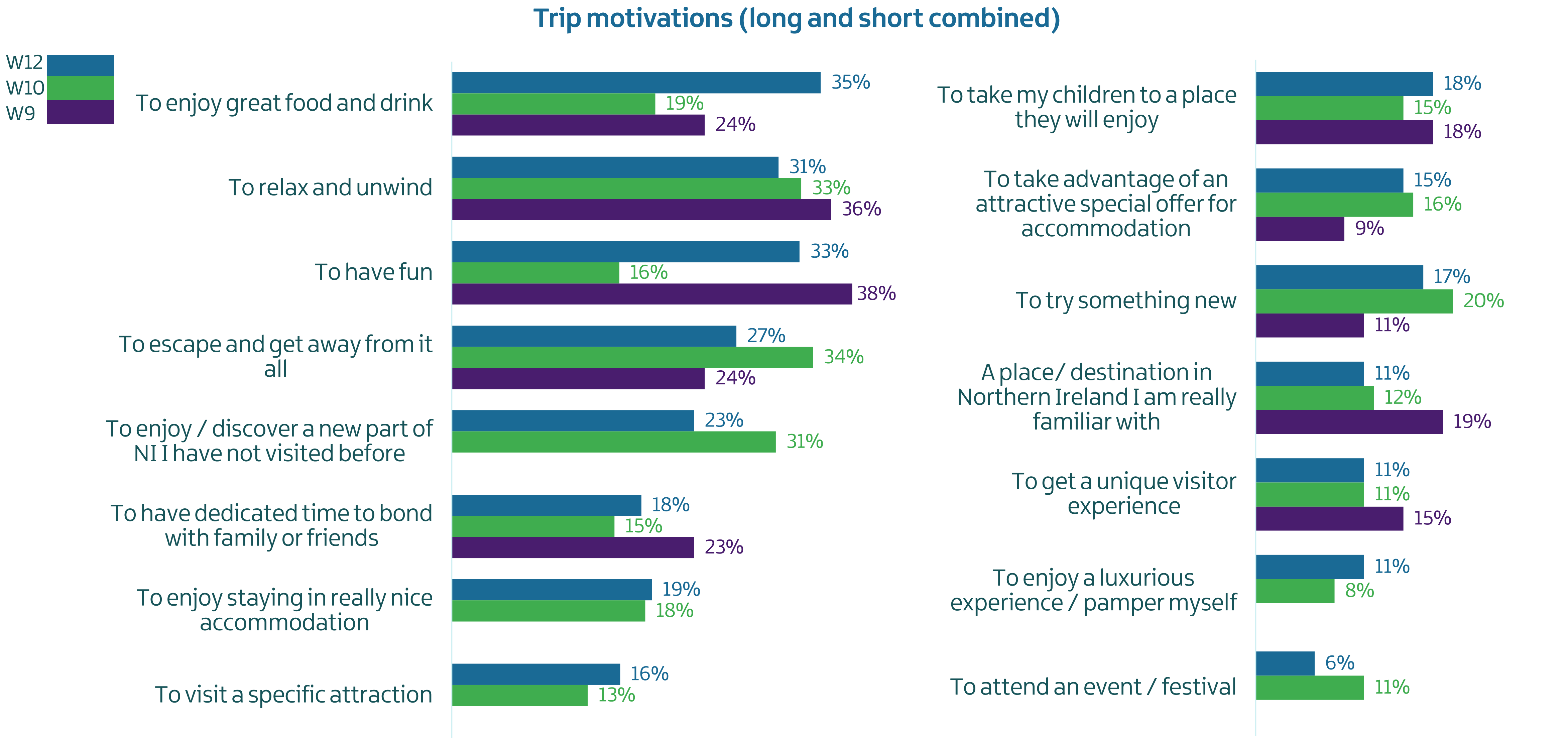
Long break planned for



N = 60 considering long break

E1b. Would you consider taking a long break in NI in April 2023 – June 2023 / 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/ fun remain key motivators for trips to NI – but interesting to see food and drink increase in importance

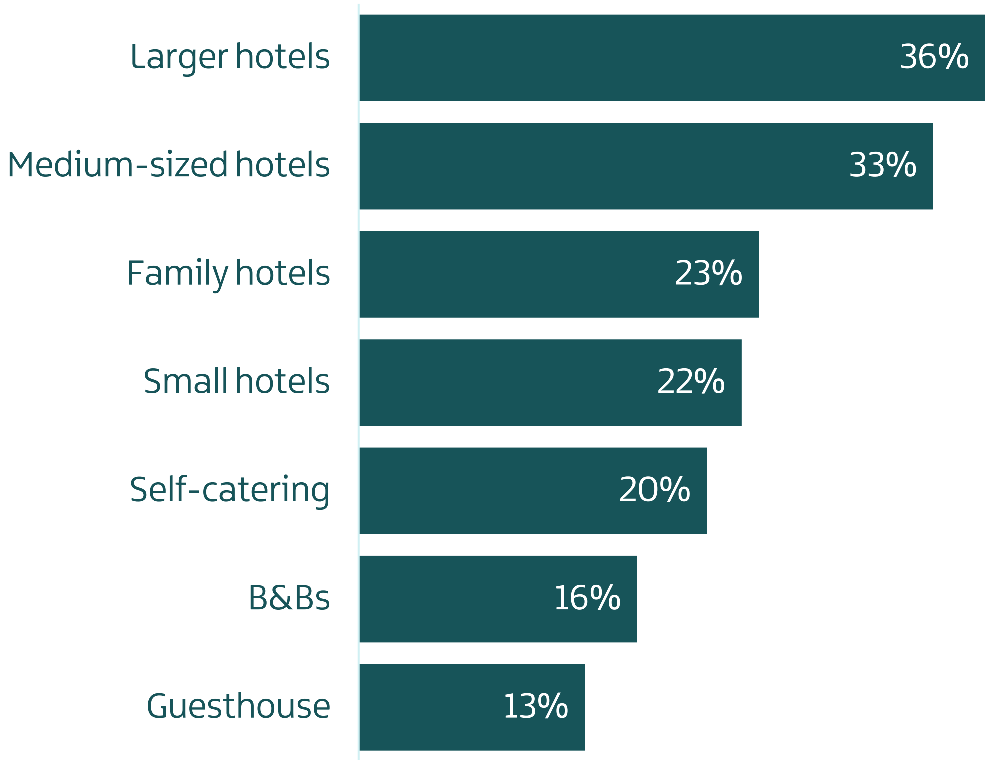


N = 172

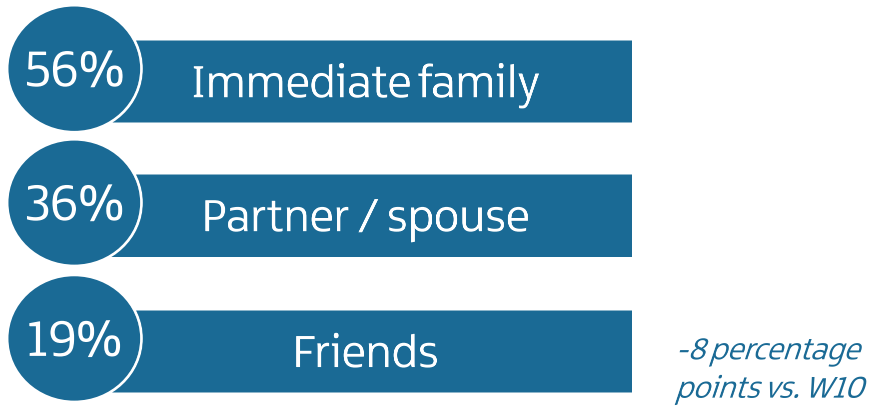
E4a. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the trip?

Large/ medium hotels still top accommodation types; immediate family features higher than travel with friends at this moment

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



Who travelling with (long & short combined)

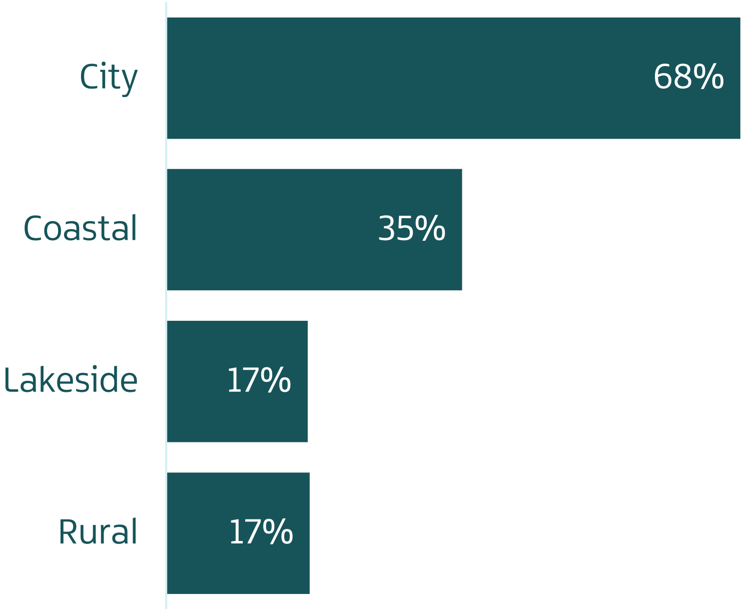


N = 172

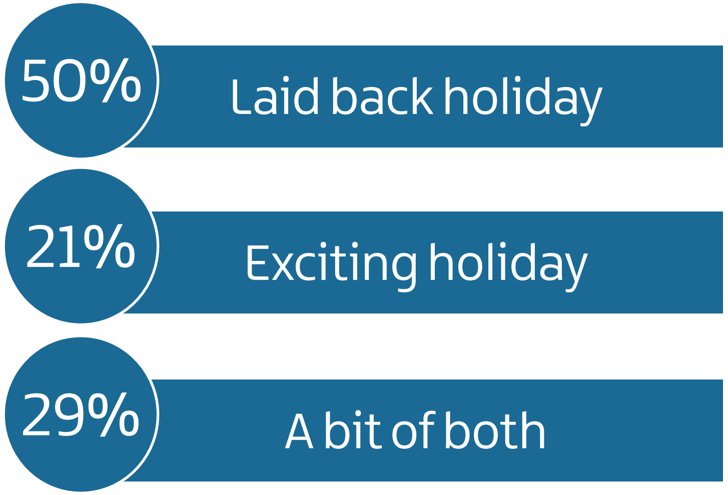
E5. Who do you intend on travelling/sharing your holiday(s) with?
E7. Thinking about your upcoming break(s) in Northern Ireland, what type of accommodation do you expect to stay in?

City breaks clearly preferred over other types of holiday – notable that "exciting" holidays on the rise again

Type of break preferred



Type of trip preferred



+9 percentage points vs. W10

N = 172

E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer?
E36. Which of the following best describe your upcoming short break(s) or long trip(s) in NI?

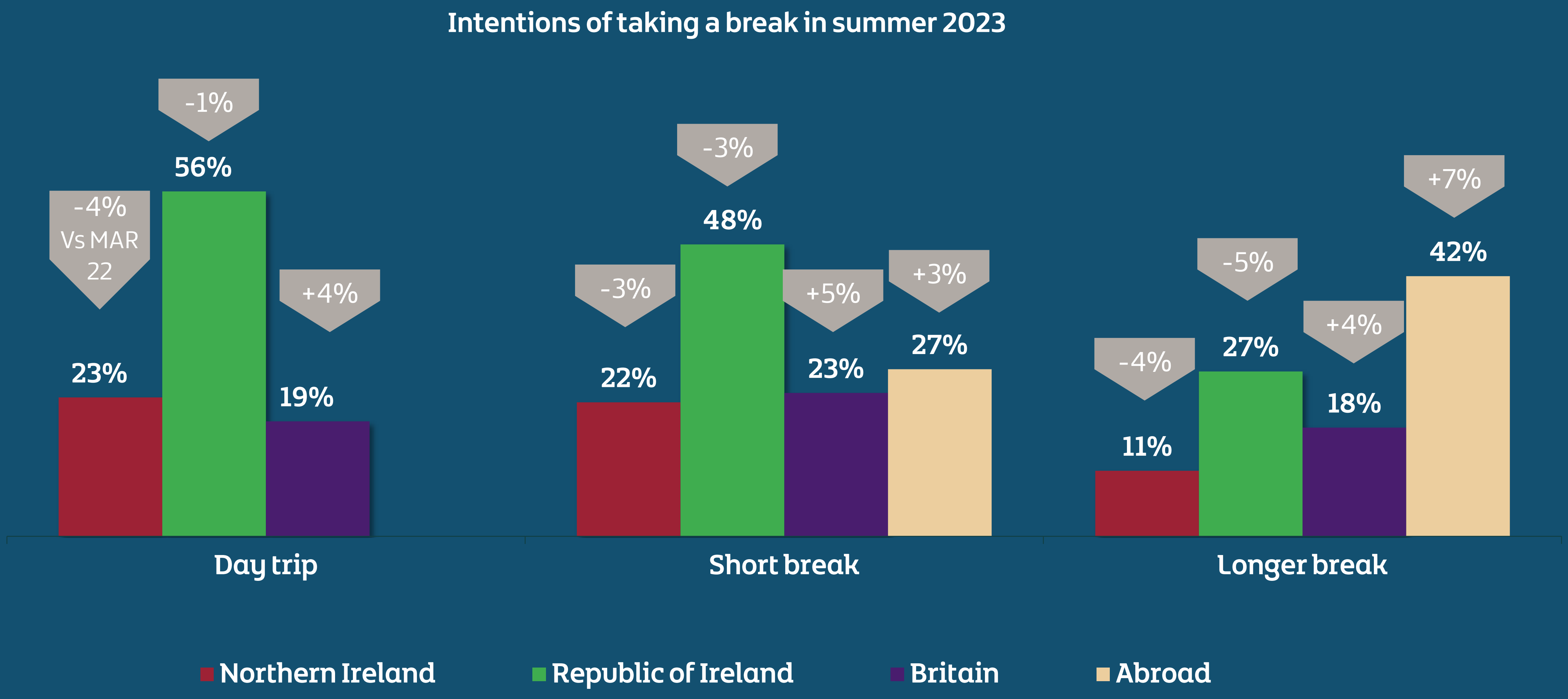
Two fifths of ROI consumers are likely to book their accommodation directly with the provider

35-54s most likely to book direct (49%)

N = 172

E8W12. How do you plan to book your upcoming short or long break in Northern Ireland?

For summer 2023 slight dips in short break / long break intentions compared to this time last year – interest in trips abroad may be driving this

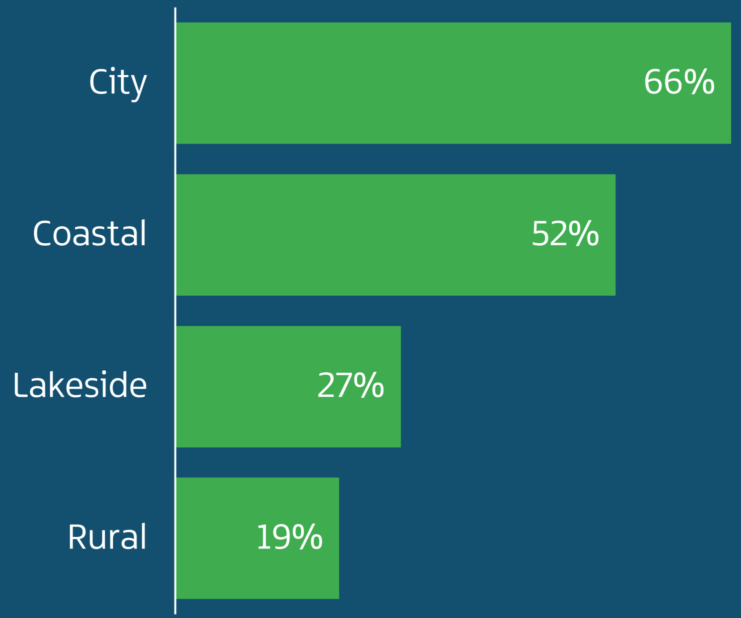


N = 750

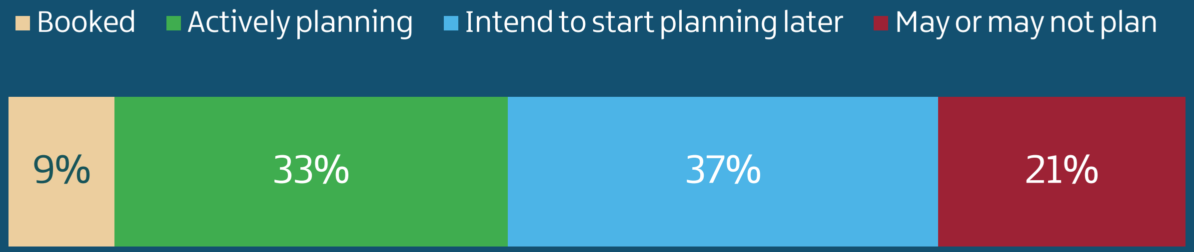
E24a. Would you consider taking any of the following types of trips in the Republic of Ireland, Northern Ireland or Britain in summer 2023 (July to August)?

For trips in summer, coastal breaks are more likely to be considered than earlier in the year. Reasonable number already actively planning

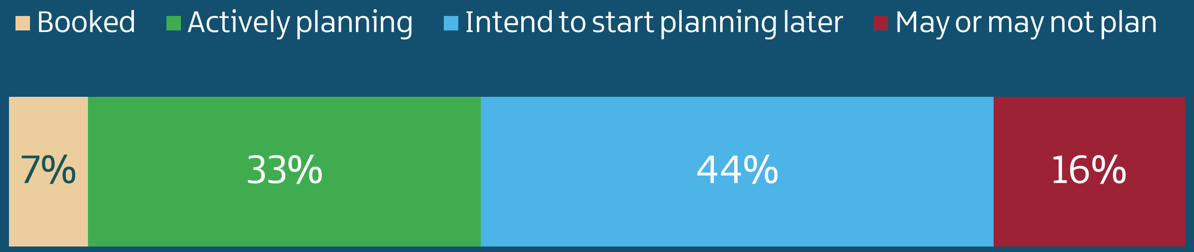
Type of break considered



Amount of short break planned



Amount of long break planned



N = 194

E24c. Which of the following destination types would you consider this summer (i.e. July to August)?
E25. Thinking about your possible summer break in Northern Ireland, have you booked or thought about planning this trip?

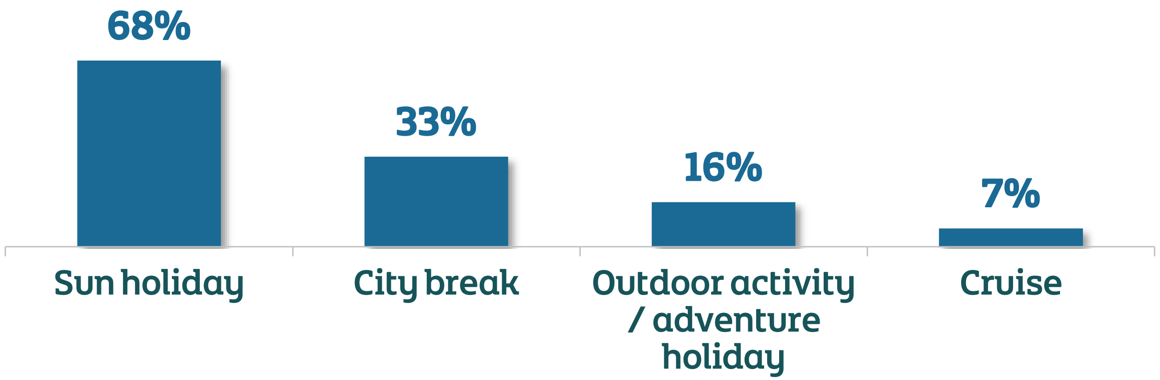
3 in 5 planning holidays abroad – July and August will be the key months for travel abroad. Most have already booked or are actively planning their trips

58% of total sample are considering a break abroad in the next 6 months

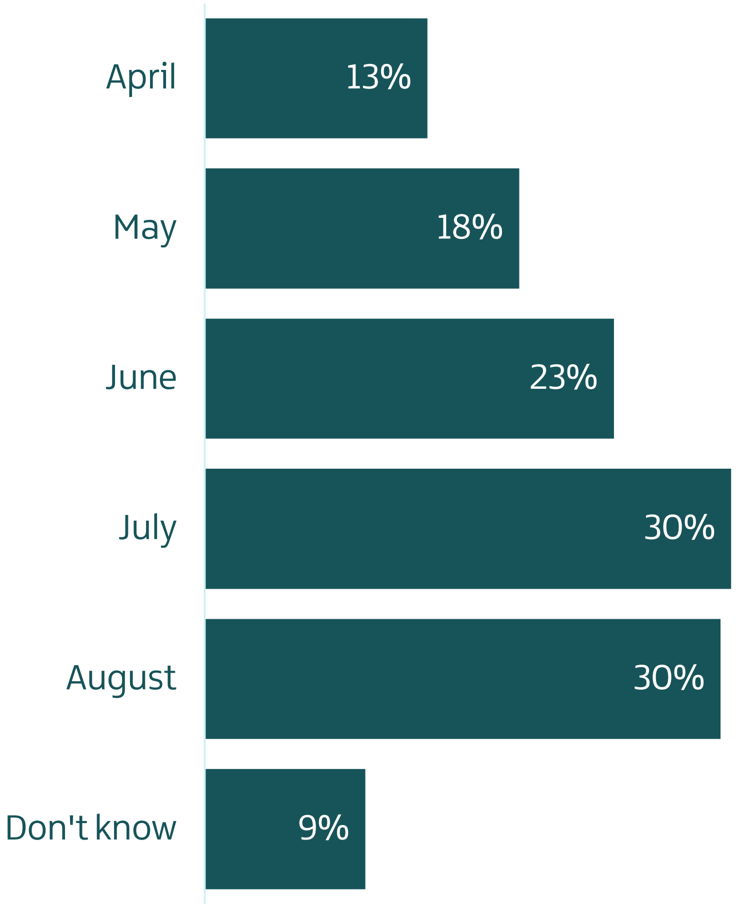
68% of this cohort are actively planning or have booked their trips

In Wave 10 (conducted in December) 62% were considering breaks abroad in the following 6 months – this figure has been growing wave-on-wave but we appear to have reached a plateau. However when compared to a year ago (March 2022) this is up 8 percentage points from 50%

What type of trip are you considering?

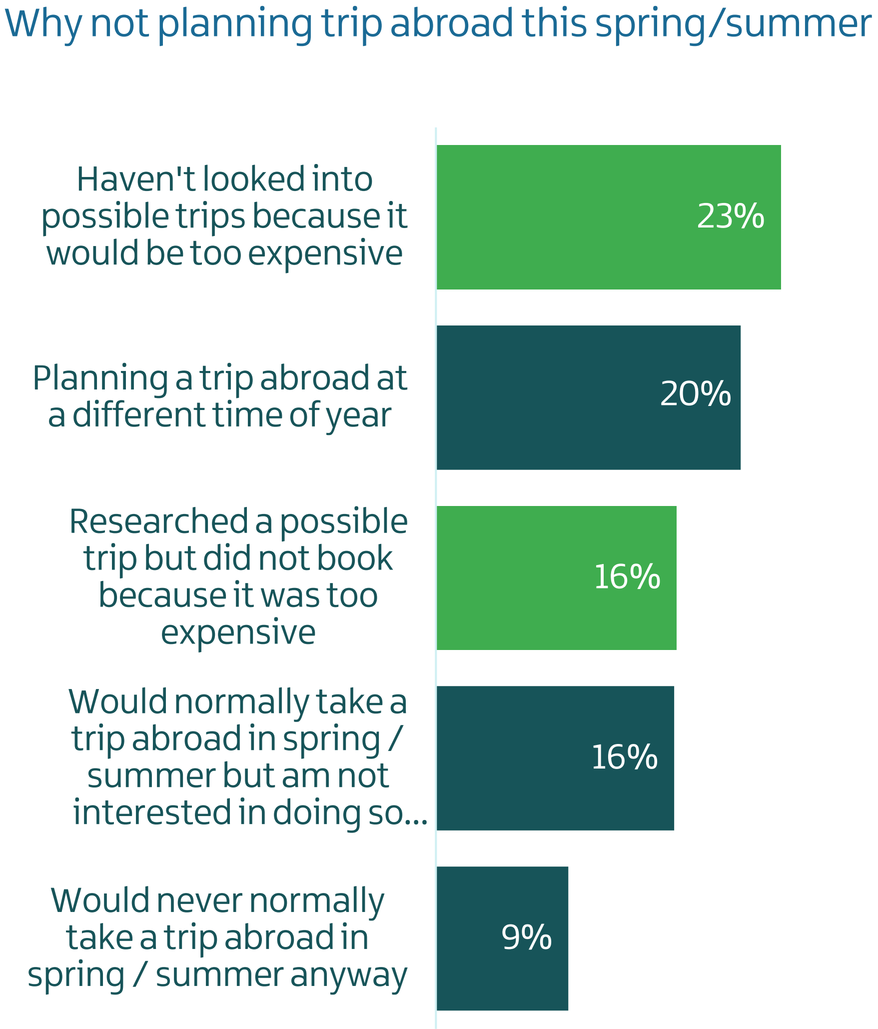


When trips abroad are planned for



E29. In which of the following months are you considering travelling?
E14. Have you booked or thought about planning this trip abroad?
E15New. What type(s) of holiday or short break abroad are you considering?

Key trip abroad motivations are relaxation/ escapism, with climate also high on the list. Among those who aren't going abroad, cost is a key factor – 39% either assumed trip would be too expensive or found this the case after research



E15bNew. What has encouraged you to consider a holiday or short break abroad this spring / summer (March to August)

E14c. You mentioned that you are not planning a break abroad this spring / summer (March to August). Which of the following best describes your reasons for not taking a break abroad?

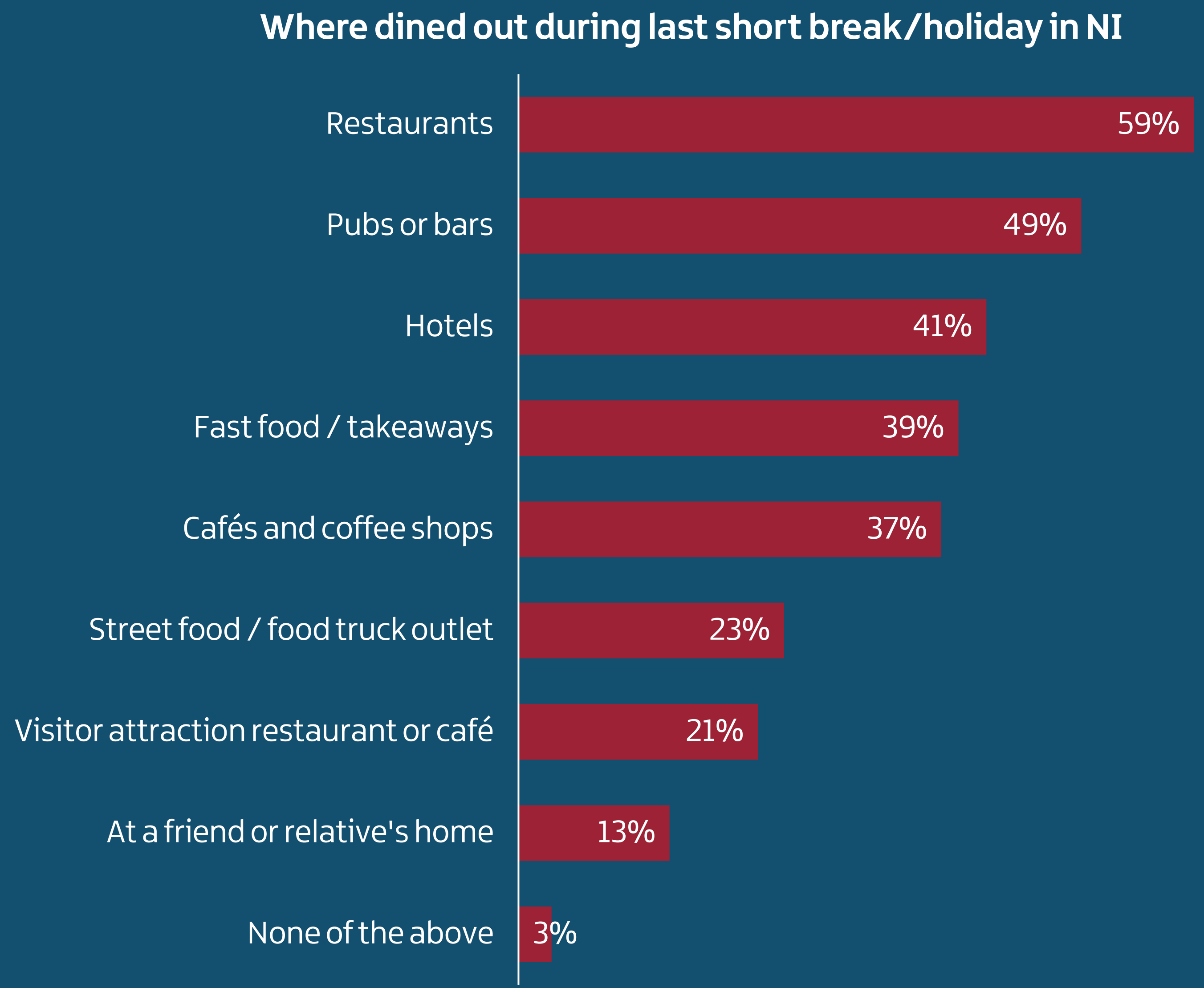
Market comparison – Trip expectations

Long trip intentions down, short / day trip intentions up in both markets vs. this time last year

- Day trips / short breaks intentions increase slightly in ROI and significantly in NI vs. March 2022 (40% of NI residents are likely to take a short trip in next 3 months vs. 31% last year)
- **However long trip intentions drop in both markets – likely due to post-Covid re-emergence of trips abroad**

Food & Drink

Restaurants, pubs / bars, hotels - the top 3 places they ate out during their last short break or holiday in NI



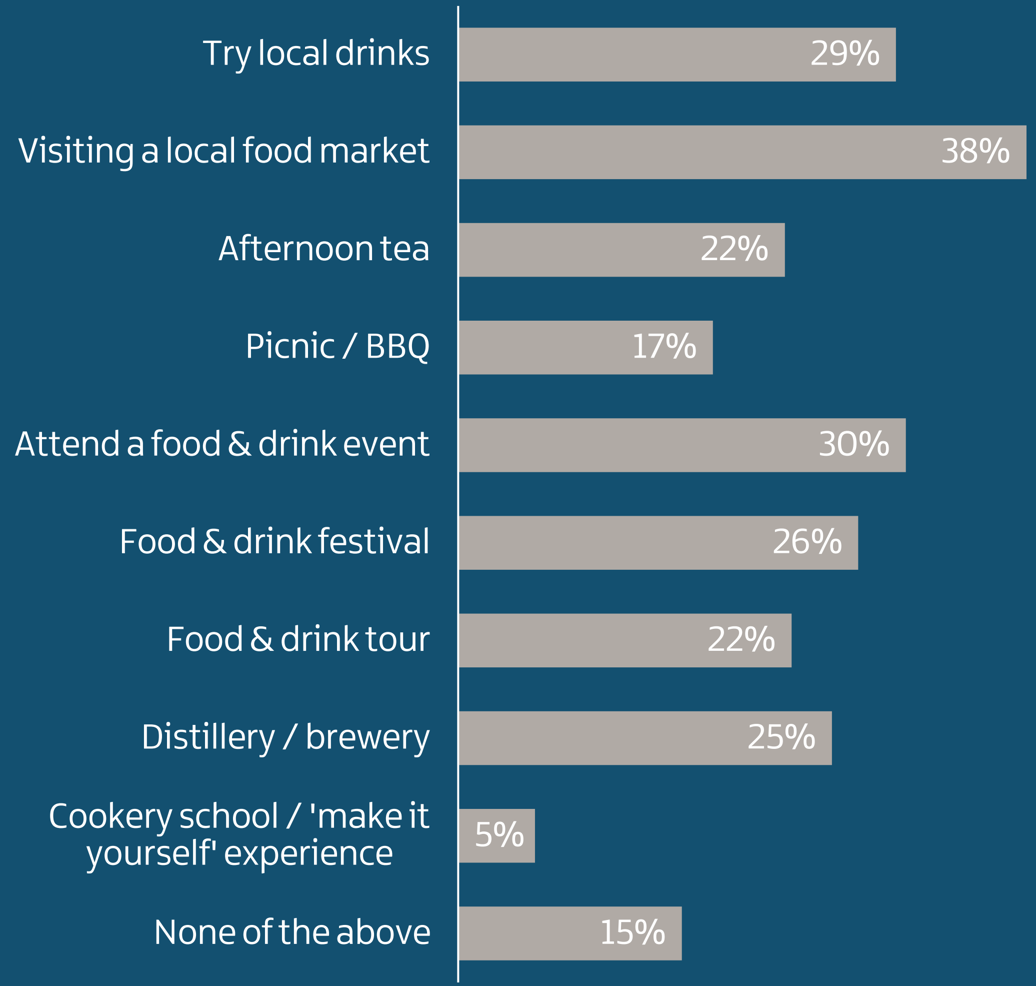
N = 427 (those who have taken a break in NI in the past 3 years)

K1. Which, if any, of the following did you eat out in during your last short break or holiday in Northern Ireland?

ROI consumers are more likely to have tried local drinks/ visited a local food market. Some interest in less-tried activities like food & drink events/ festivals/ visiting breweries

Food/drink experiences participated in

Interest in participating in food/drink experiences

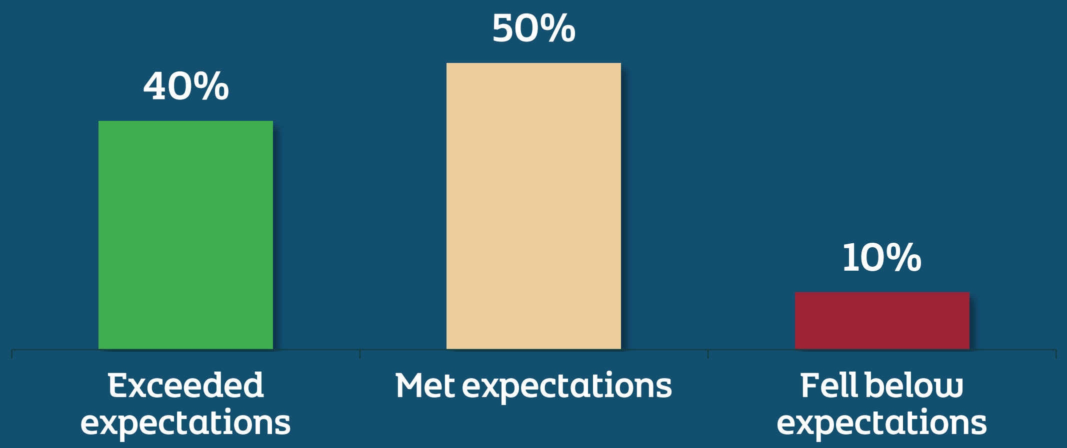


N = 427

K2. And which, if any, of the following food & drink experiences did you participate in? ;
K3. If you were to take a short break or holiday in Northern Ireland in the future, which of the following would you be interested in?

90% say food experience met or exceeded expectations – with Google and social media the key sources of info when it came to choosing places to eat out

Food experience at accommodation versus expectations



Research/booked places to eat before short break/trip

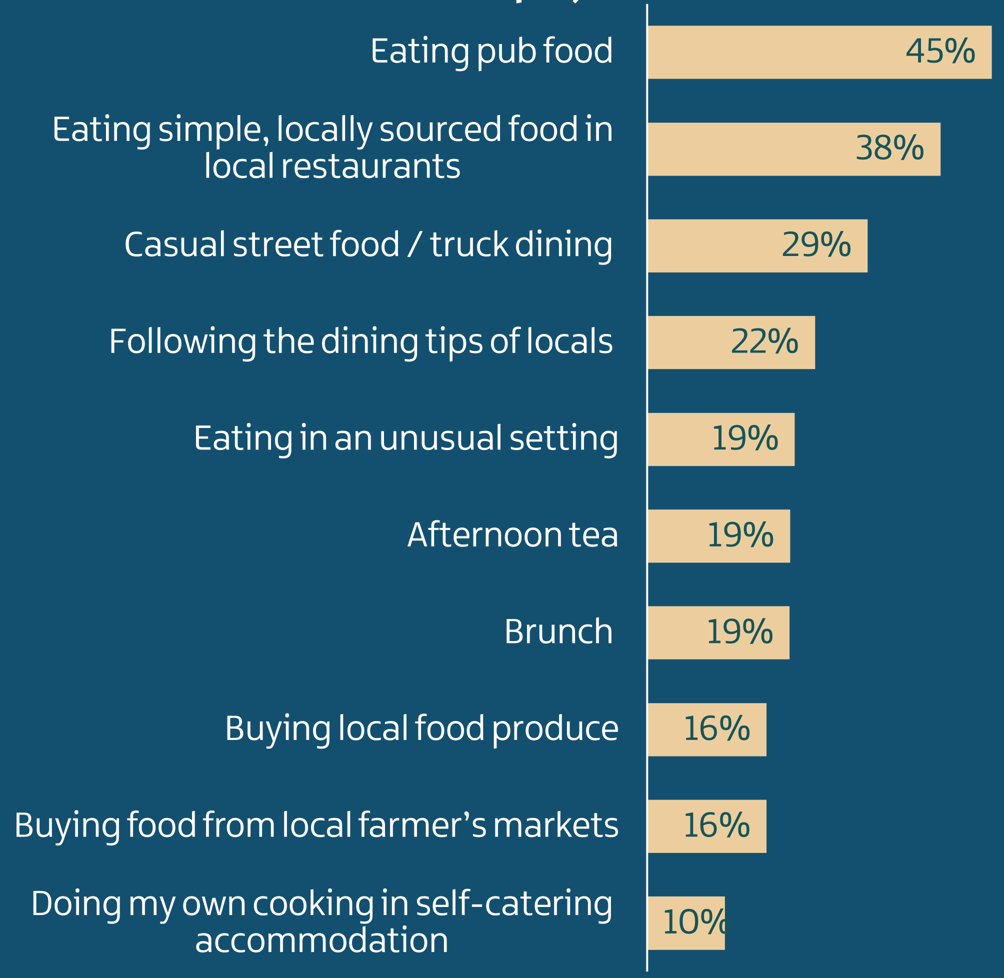
Sources of information to choose places to eat out (10% or higher)

N = 328 stayed in serviced accommodation

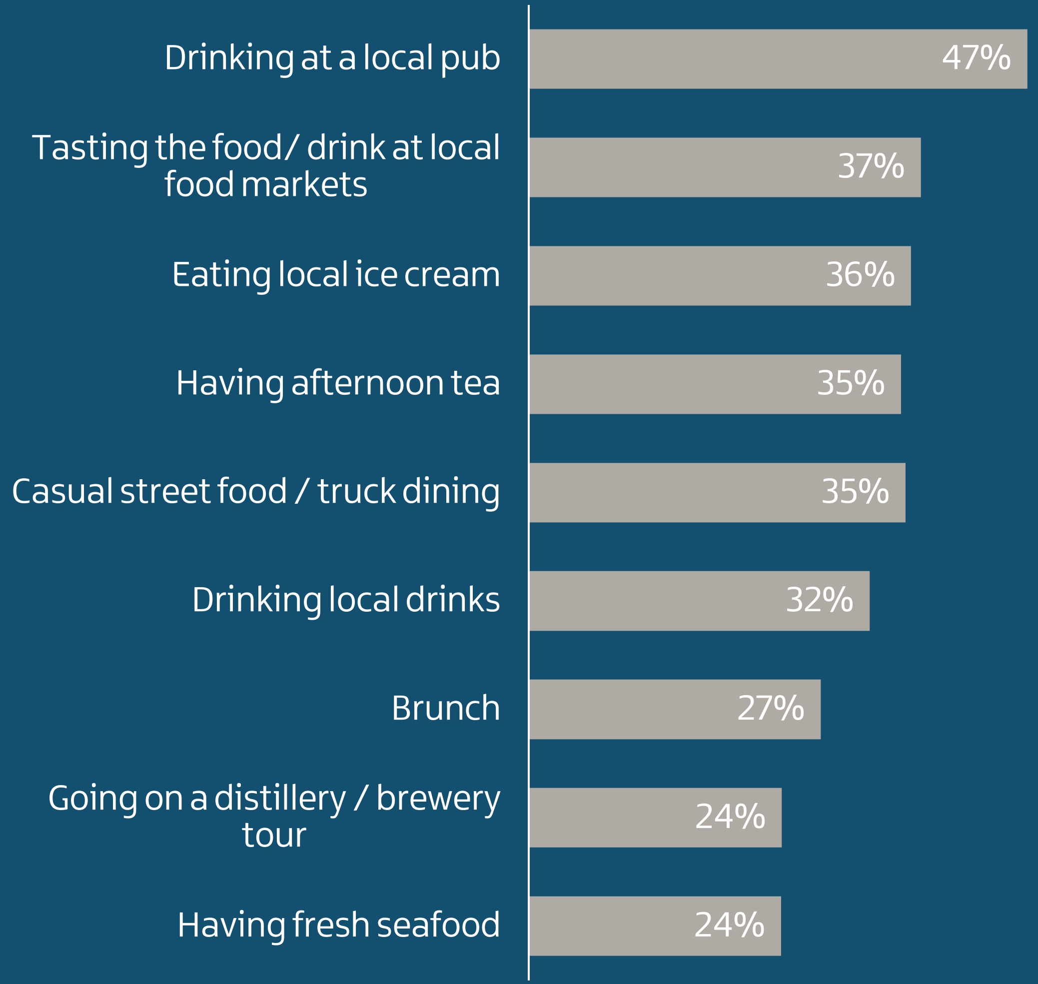
K12. Thinking again about your accommodation, did the quality of the food experience at your accommodation meet your expectations?
K13. Did you research or book places to eat before your last short break or holiday in Northern Ireland?
K14. Which, if any, of the following sources of information did you use to help choose places to eat out?

Eating pub food and drinking at a local pub are appealing, along with restaurants and food markets

Food & drink experiences they would like to try in future (total sample)



Activities that would appeal to them



N = 750

K15. Which, if any, of the following types of food & drink experiences do you think you would most look forward to enjoying if you were to take a short break or holiday in Northern Ireland in future?
K16. And which, if any, of the following activities do you think would appeal to you?