Consumer Sentiment
ROI Market
December 2021 Report

tourism northernireland

SPARK
The Strategic Insight Agency

Research background

Research Background & Objectives

This is the **6th wave** of our consumer sentiment barometer for the Republic of Ireland (ROI). We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how things are changing as Covid cases rise.

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 11th Nov – 1st Dec

We interviewed a robust, nationally representative sample in the Republic of Ireland

Total sample = 750

Gender

51%

49%

Social Grade

55% ABC1

45% C2DE

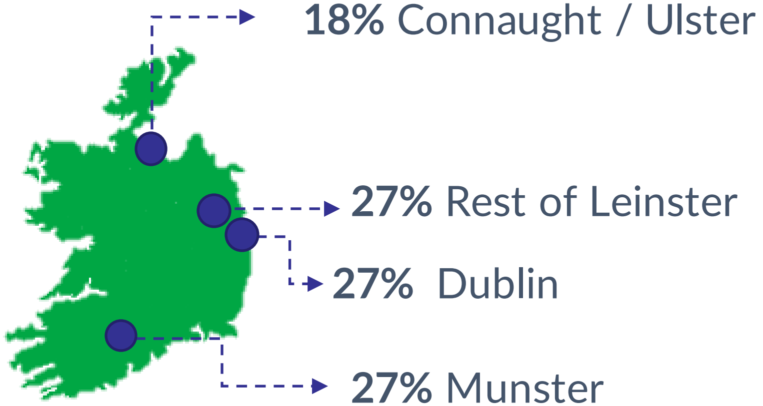
Age

18-24 years	12%
25-34 years	20%
35-44 years	20%
45-54 years	18%
55-64 years	16%
65+ years	14%

Lifestage

Pre-family	24%
Young family	11%
Mid family	13%
Older family	22%
Empty nesters / Older, no kids	30%

Region



Base n = 750

Key Takeaways

For better or worse, Covid (and restrictions) are back...

- Number saying 'the worst is still to come' now higher than ever - and ROI seems harder hit by this sense than NI.
- Confidence in being able to travel at the moment dips from 58% to 29%.
- Ease in engaging with activities, particularly indoor activities, also dips.
- **N.B. Important to note media coverage relating to the Omicron variant did not emerge until the latter stages of the research.**

...but this does not translate into real anxiety or trepidation about travel

- Sense of stress / anxiety remains stable vs. previous wave in spite of rising case numbers.
- Travel intent to NI (next 3-4 months) actually grows vs. the previous wave for both short and long trips.

Covid security required at forefront of messaging

- While there is appetite to travel, there is also more nervousness now about Covid safety and the possibility of cancellations.

Value for money still the key draw for NI

- 93% said their NI trip met or exceeded expectations, with VFM of food and drink among the key drivers of this.
- Sense of welcome and hospitality is strongly felt with this the top-rated aspect of trips.

Covid-19 and tourism

Spike in cases (and arrival of Omicron in latter stages of fieldwork) mean number saying worst is still to come **higher than ever**

How is the Covid situation going to change in the coming month?

More negative outlook among **females** (54%), **55+** (54%), and **empty nesters** (56%)

In previous waves over-55s were the most optimistic age group

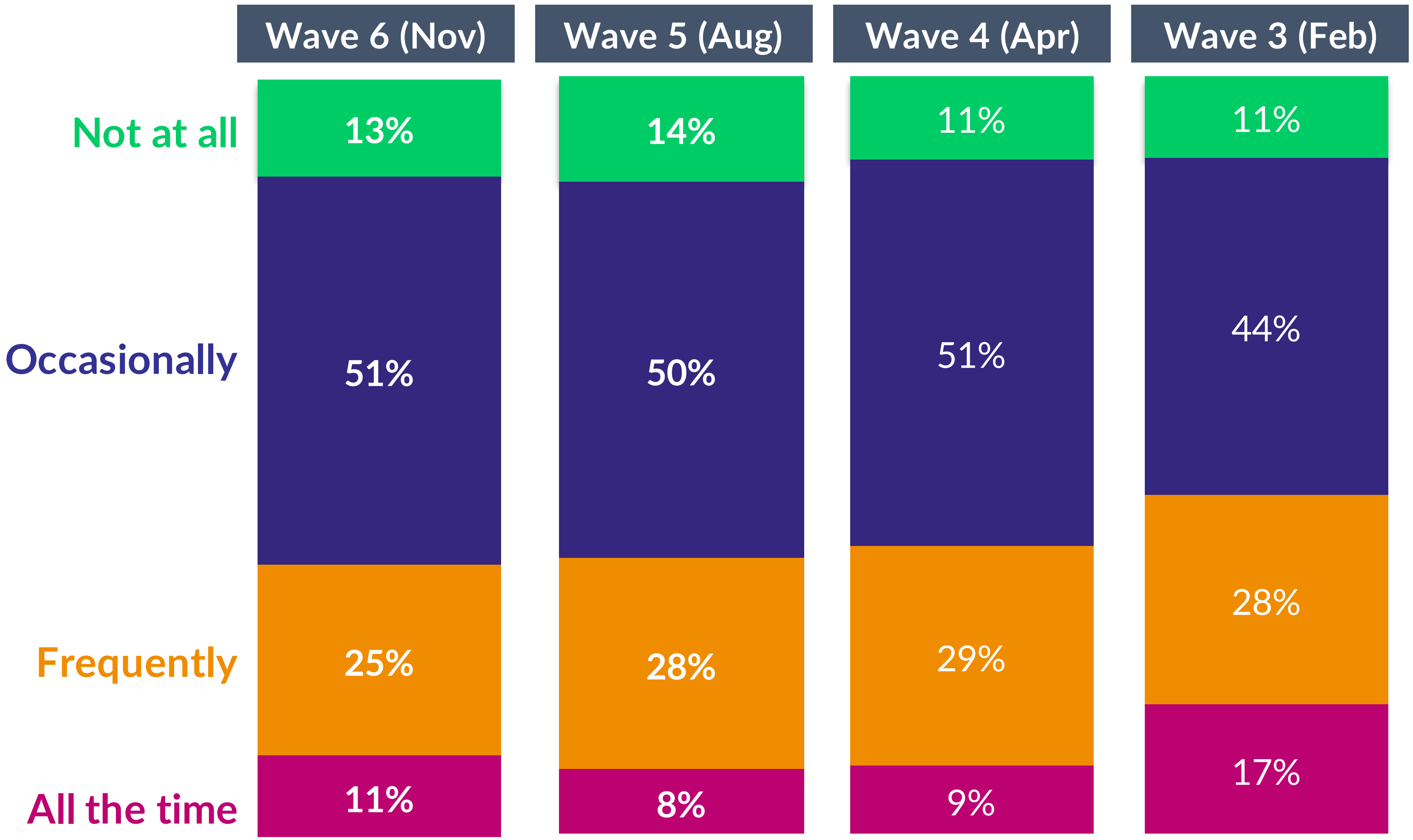
More positive outlook among **18-24s** (21%)

Base n = 750

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

However - **no significant rise in anxiety** – stable vs. last wave, with a slight increase in those anxious ‘all the time’

Stress / anxiety levels during Covid



Base n= 750

Most likely to report being anxious frequently / all the time:

- **Females** 40%
- **25-34** 42%
- **Young family** 40%

While over-55s most likely to predict the worst is still to come, actually the least anxious group, with 32% anxious frequently / all the time

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

Market Comparison
Covid-19 & Tourism

Greater sense of nervousness about the Covid situation in ROI than NI

49% in ROI think the 'worst is still to come' – in NI, this figure is much lower, at **38%**

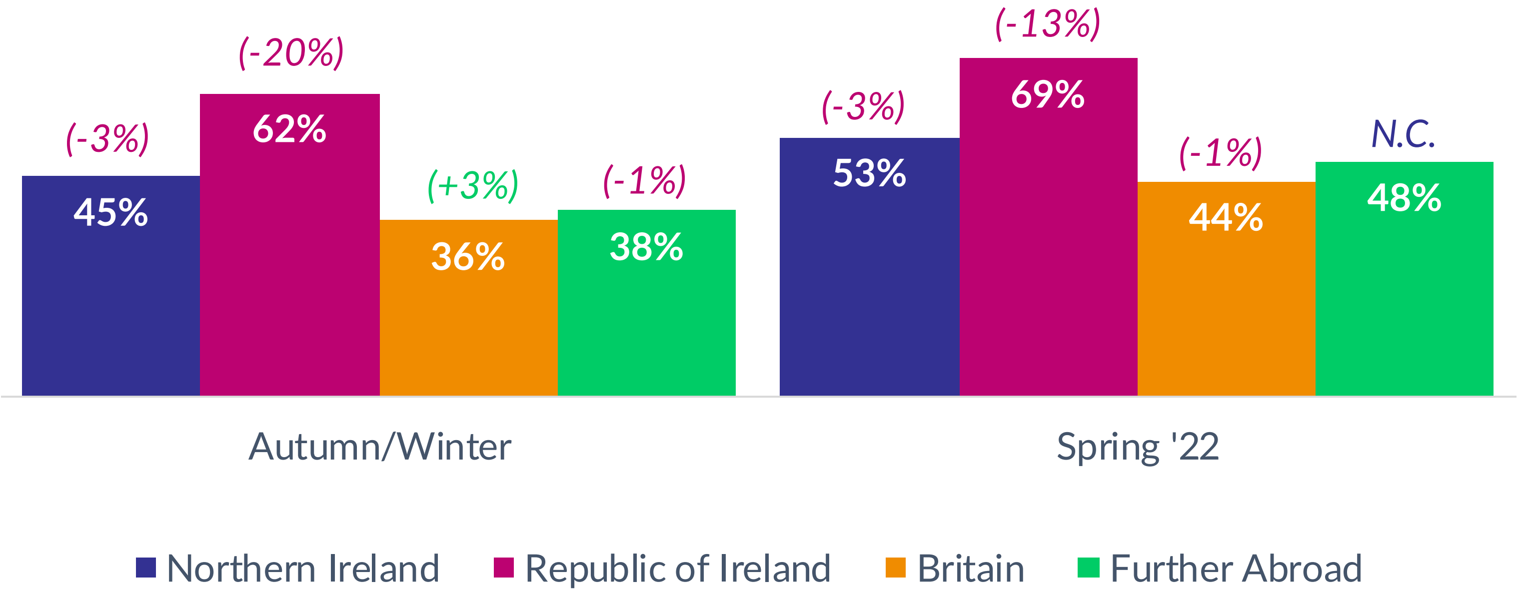
However, positive that neither market sees a significant rise in anxiety

36% feeling anxious 'frequently / all the time' in ROI and **40%** in NI – both in line with figures from August

Current attitudes towards travel

ROI safety perceptions **significantly harder hit** than NI – and this continues into spring

How safe would it be to go on holiday in... *(scores vs. Aug)*



Base n= 750

B1. How safe do you think it would be to take a holiday or short break in each of the following locations this autumn / winter (i.e. November 2021– January 2022)? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations during the spring (i.e. March – April 2022)?

Travel confidence low but will start to pick up in Feb / Mar – **expect volumes to grow at this point**

29%
would be confident in a holiday on IoI this month

W4 (April): **16%**
W5 (August): **58%**

Less nervousness around travel than in April – but many look likely to wait until start of spring

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

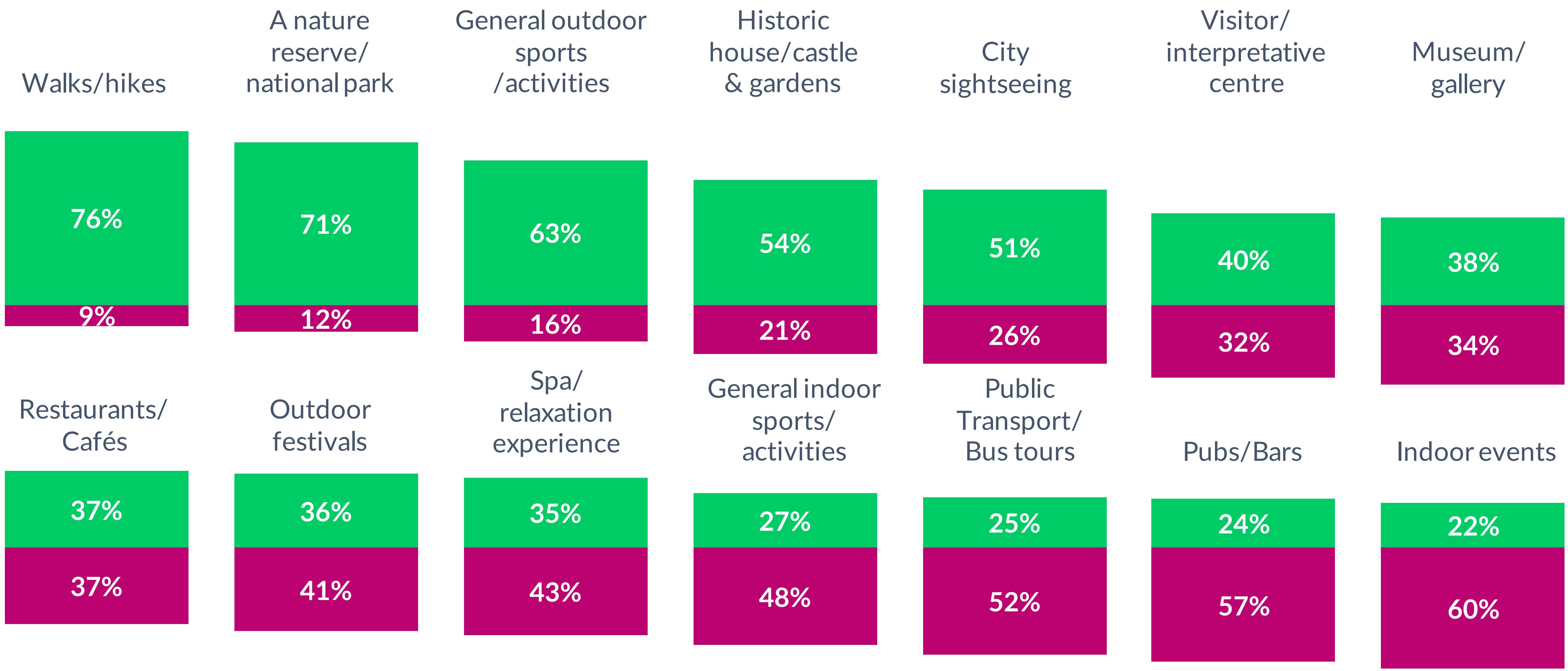
Base n= 750

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)?

Nervousness around all activities grows, especially indoor activities

Ease in engaging with activities this autumn / winter

At ease
Nervous



All activities drop in sense of ease vs. previous wave – biggest drop for museums and visitor centres

Base n= 750

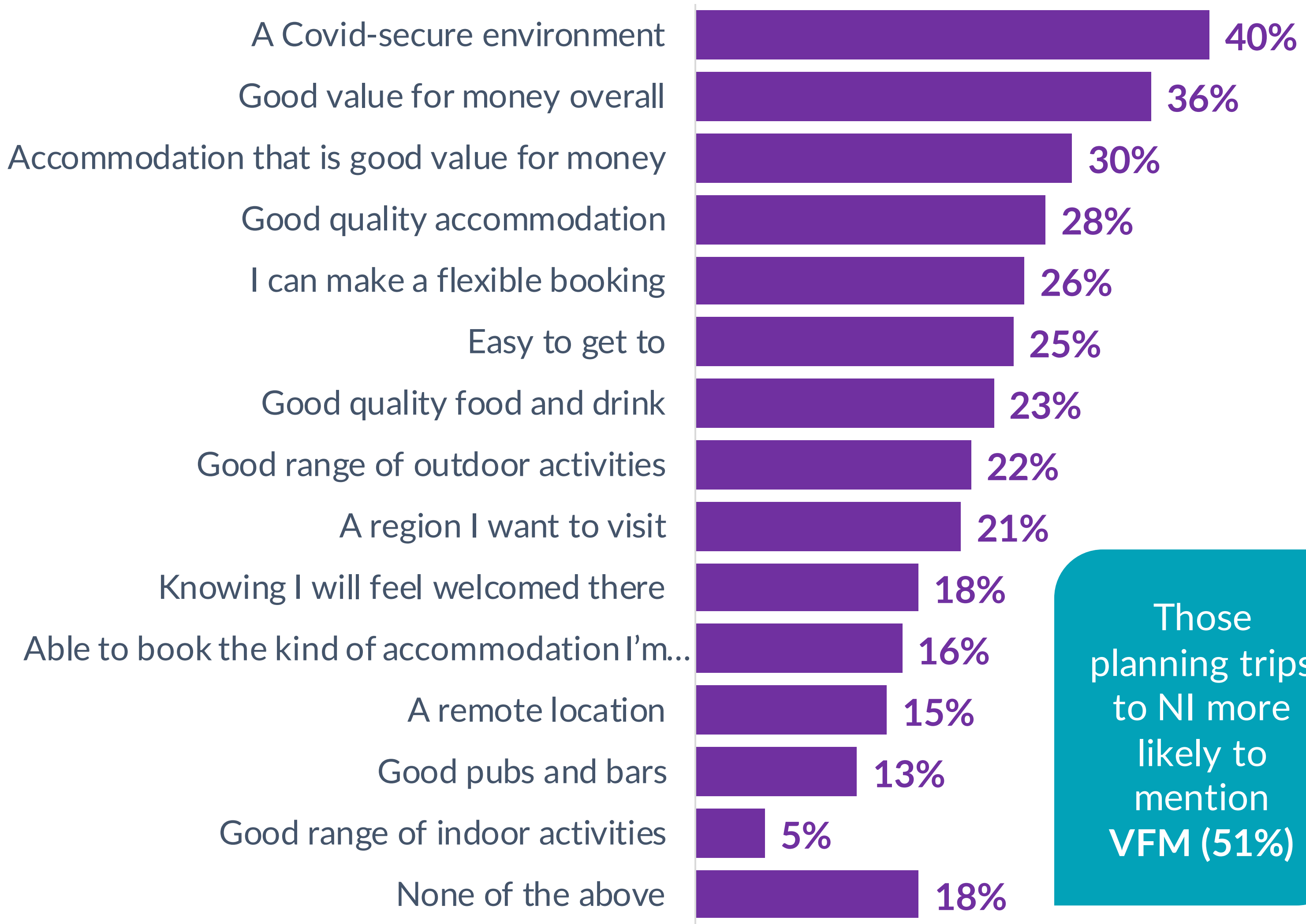
B4. How do you currently feel about engaging in these activities this autumn / winter (i.e. November 2021 – February 2022)?

Covid-security now number one trigger to consider a break in NI

Value for money also remains crucial, especially for those actively planning trips

Base n = 750

Triggers to consider a short break in NI



Those planning trips to NI more likely to mention **VFM (51%)**

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

Offers

Refunds and **discounts** most likely to encourage consideration of travel to NI

- When asked what offers would increase the likelihood of considering a short break in NI this year, the top 2 options selected were:

  - Option to cancel with full refund

  - Accommodation discounts

Base n = 750

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

Market Comparison

Current Attitudes towards Travel

Big divergence in perceptions of safety in consumers' home regions

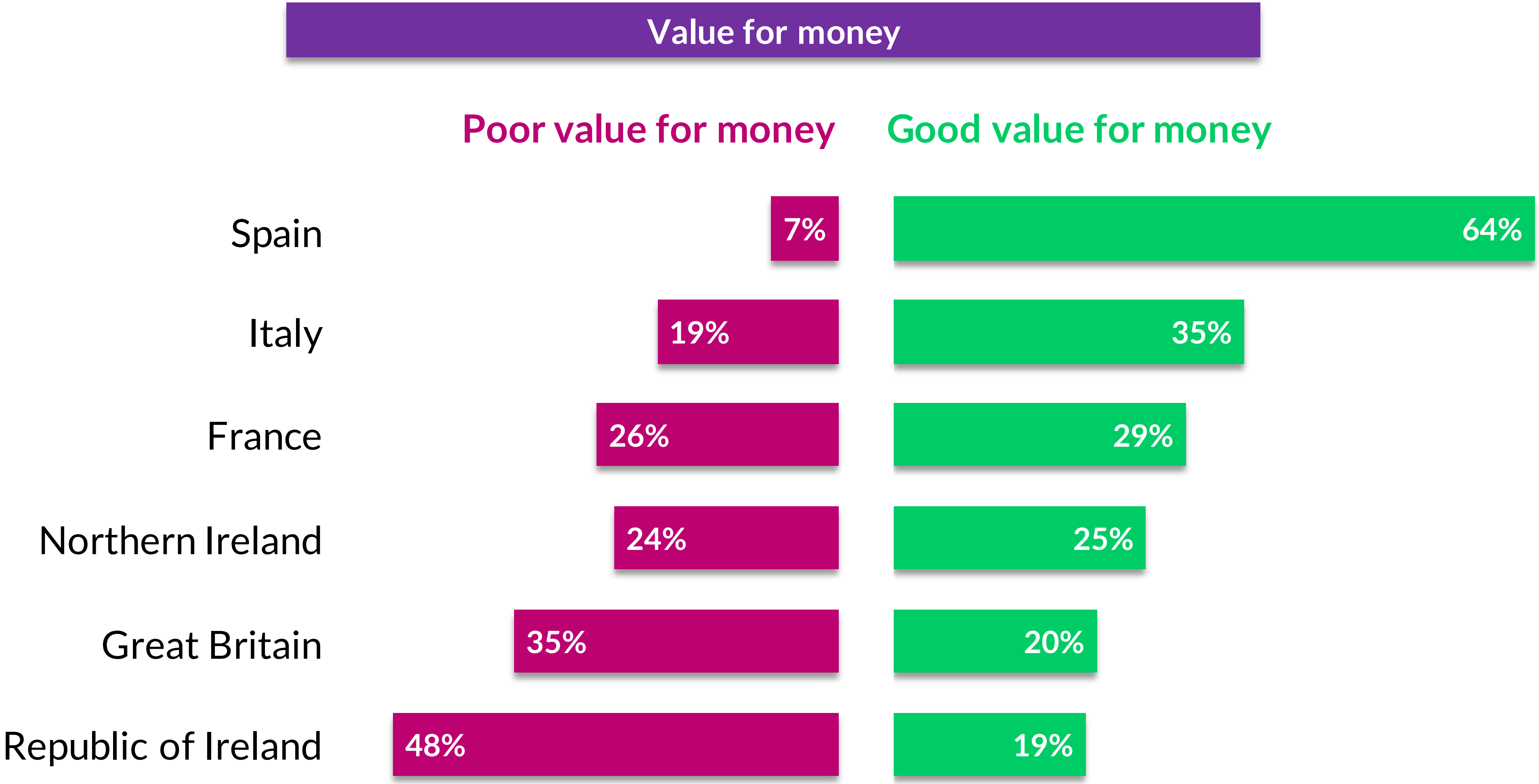
ROI residents' perception of ROI safety drops by 20% to **62%**; for NI residents NI perception stays stable at **71%**

NI residents now more confident in being able to travel on Island of Ireland

41% (down 4) of NI residents would be confident a holiday wouldn't be cancelled; for ROI residents this is **29%** (down 23)

Value for money

Few changes in perception of value for money, with NI still significantly ahead of GB + ROI



Net Score

	Nov	Aug	Apr
Spain	+57	+57	+57
Italy	+15	+15	+18
France	+3	+1	0
Northern Ireland	+1	+1	-8
Great Britain	-15	-12	-15
Republic of Ireland	-29	-34	-28

N = 750

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

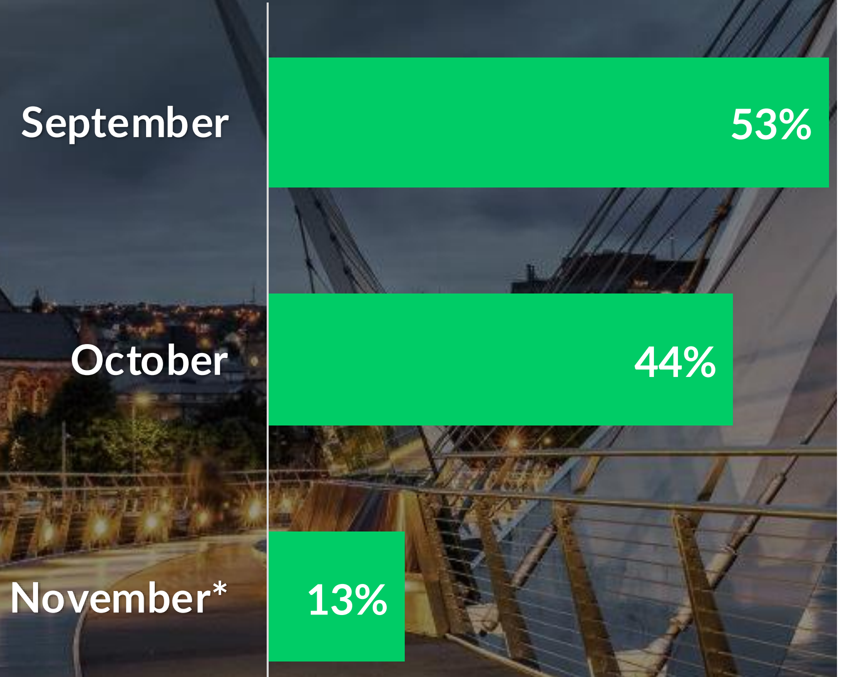
Travel experiences of NI in 2021

A good number taking holidays in NI, particularly in Sept. Number who didn't travel at all climbs vs. Aug, unclear if **seasonal or Covid-related**

9%
have taken some sort of holiday in NI since Sept 2021

55% were first time visitors to NI

Holidays taken in…



**Likely lower as fieldwork took place in November*

N = 750 / 66 visited NI (caution low base size)

Other than NI…

29% took a break in ROI

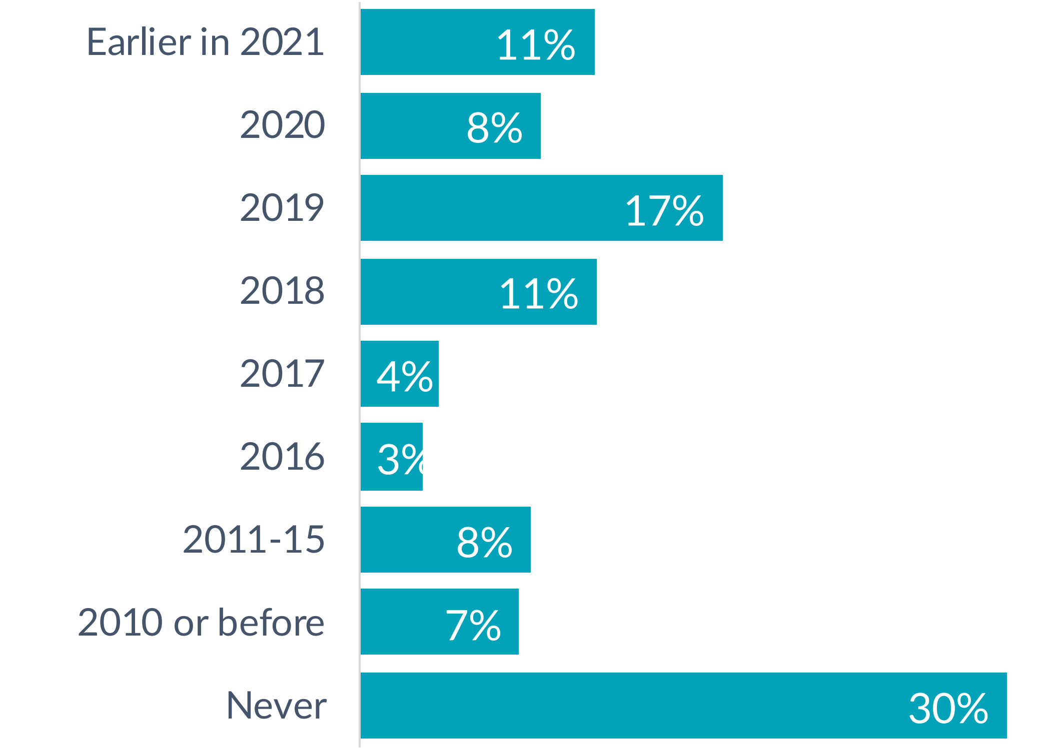
13% went abroad

56% didn't travel at all *(up 4% vs. August wave)*

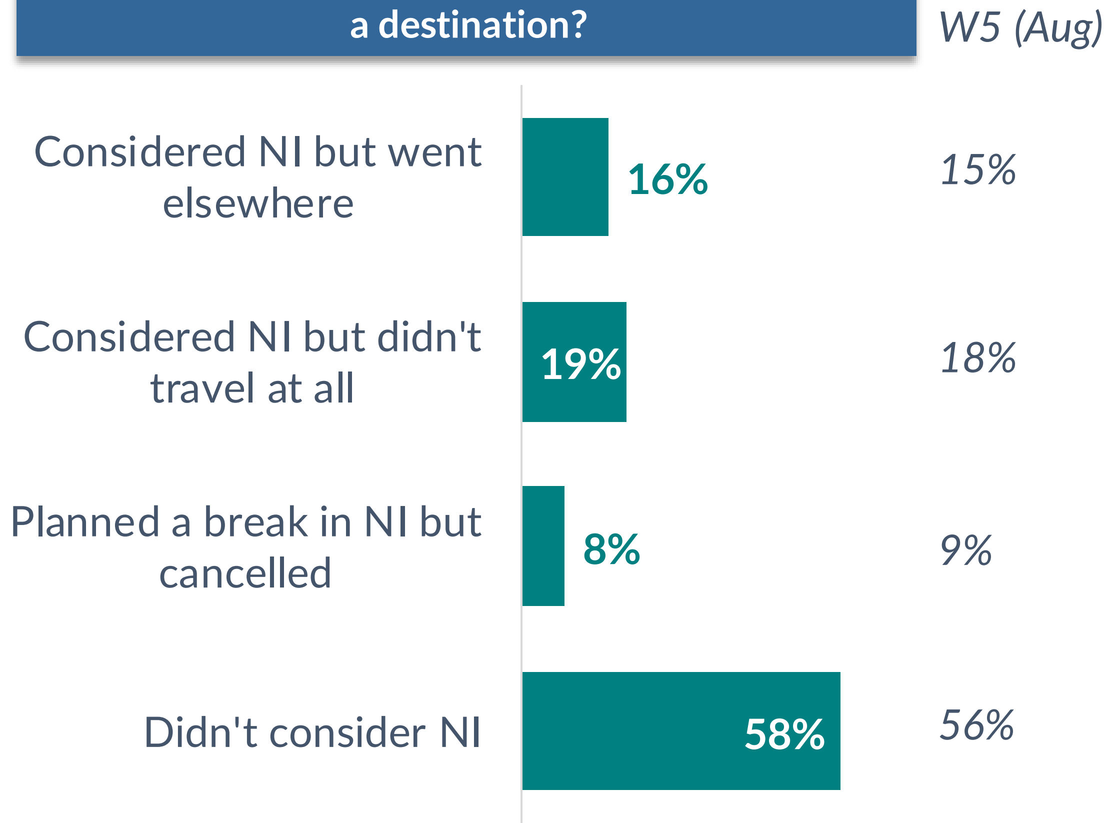
D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes since Sept 2021? / D3. And when did you take your holiday(s) or short break(s) in Northern Ireland since Sept 2021? / D4. Was this your first time taking a holiday or short break in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

Of those who didn’t visit NI, 27% had considered a trip but **didn’t travel at all**

Those who didn’t go to NI – last time they visited



Those who didn’t go to NI – did they consider NI as a destination?



Base n = 684 who didn’t visit NI

D1b. You mentioned you haven’t taken a break in Northern Ireland in 2021. When was the last time you took a holiday or short break in Northern Ireland? / D2. You mentioned you haven’t taken a break in Northern Ireland in 2021. Which of the following best applies to your consideration of Northern Ireland as a holiday destination?

Trip satisfaction remains high – biggest ‘pleasant surprise’ is VFM

How trip stacked up to expectations

43% said their trip **exceeded expectations**

49% said their trip **met expectations**

7% said their trip **didn’t meet expectations**

What they found ‘pleasantly surprising’ (caution low base)

52% price / value for money of food and drink

34% range of outdoor activities

34% price / value for money of accommodation

34% quality of food and drink

28% availability of accommodation

Base n = 66 (caution low base size)

D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations? / D5b. You mentioned your trip exceeded your expectations. What, specifically, did you find pleasantly surprising about your trip?

Sense of welcome and hospitality coming through strongly for recent visitors to NI – **many also impressed by food and drink quality**

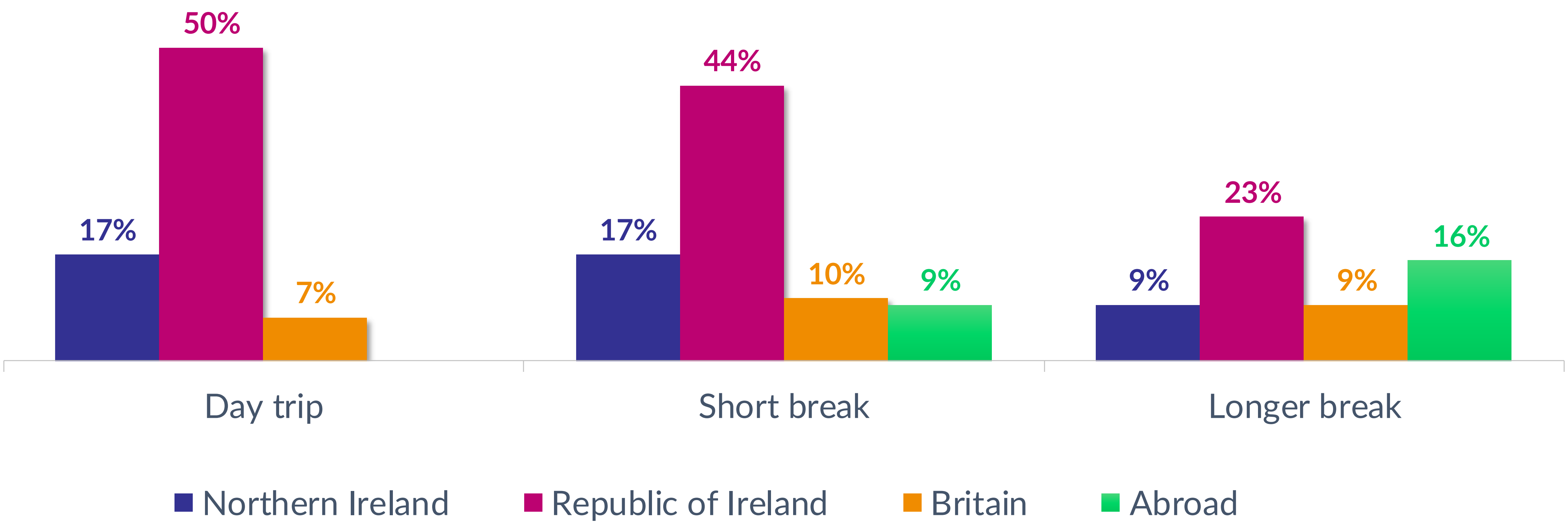
Base n = 66 (caution low base)

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

Travel intent

1 in 6 intending on taking short breaks to NI in the next 3-4 months

Intentions of Taking a Break in next 3-4 months



Base = 750

Multiple Questions

Despite growth in Covid cases, positive to see there is still appetite to travel – both short and long break intentions increase

Intention on taking a break to Northern Ireland in next 3-4 months

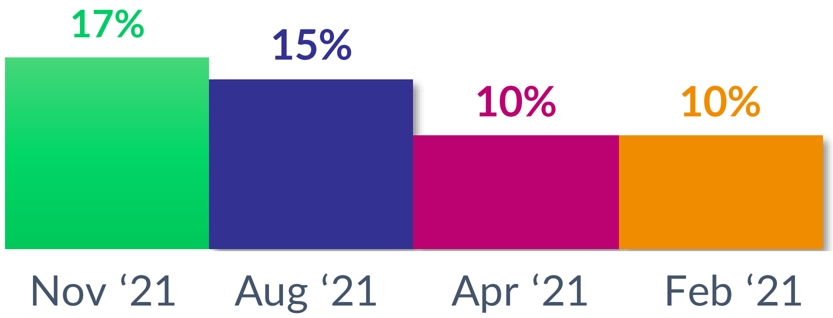
17% Leisure day trip

17% Short break

9% Long break

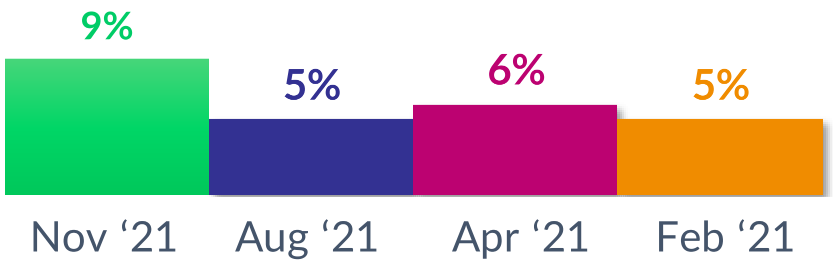
Consideration of break in Northern Ireland in next 3-4 months
(slightly different to prev waves: 'intention of break this year')

Short Break to NI



Of those considering short trips, **35%** actively planning (6% total sample)
Short trip intentions higher with **Active Maximisers** (22%) and **Indulgent Relaxers** (18%)

Long Break to NI



Of those considering long trips, **35%** actively planning (3% total sample)
Long trip intentions higher with **Indulgent Relaxers** (11%)

Base (n) = 750

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?

Intent highest in March – but very few have booked so far

N =750

17% considering taking a short break in Northern Ireland

W5: 15% W4: 9% W3: 10% W2: 13% W1: 13%

How much of your short trip have you planned?

N =131

I have booked	Actively planning	Intend to start planning later	May or may not plan
9%	26%	33%	32%

35% are actively planning a trip to NI – **6%** of the total sample

N =131

*Consideration of short breaks to Northern Ireland in:

November	December	January	February	March
7%	19%	18%	17%	28%

23% 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?

Similar story with long breaks – increase in consideration for March

N =750

9% considering a long break in Northern Ireland

W5: 5% W4: 5% W3: 5% W2: 9% W1: 6%

How much of your longer trip have you planned?

N = 66 – caution low base size

I have booked	Actively planning	Intend to start planning later	May or may not plan
11%	24%	32%	34%

35% are actively planning a trip to NI – **3%** of the total sample

N = 66

*Consideration of longer breaks to Northern Ireland in:

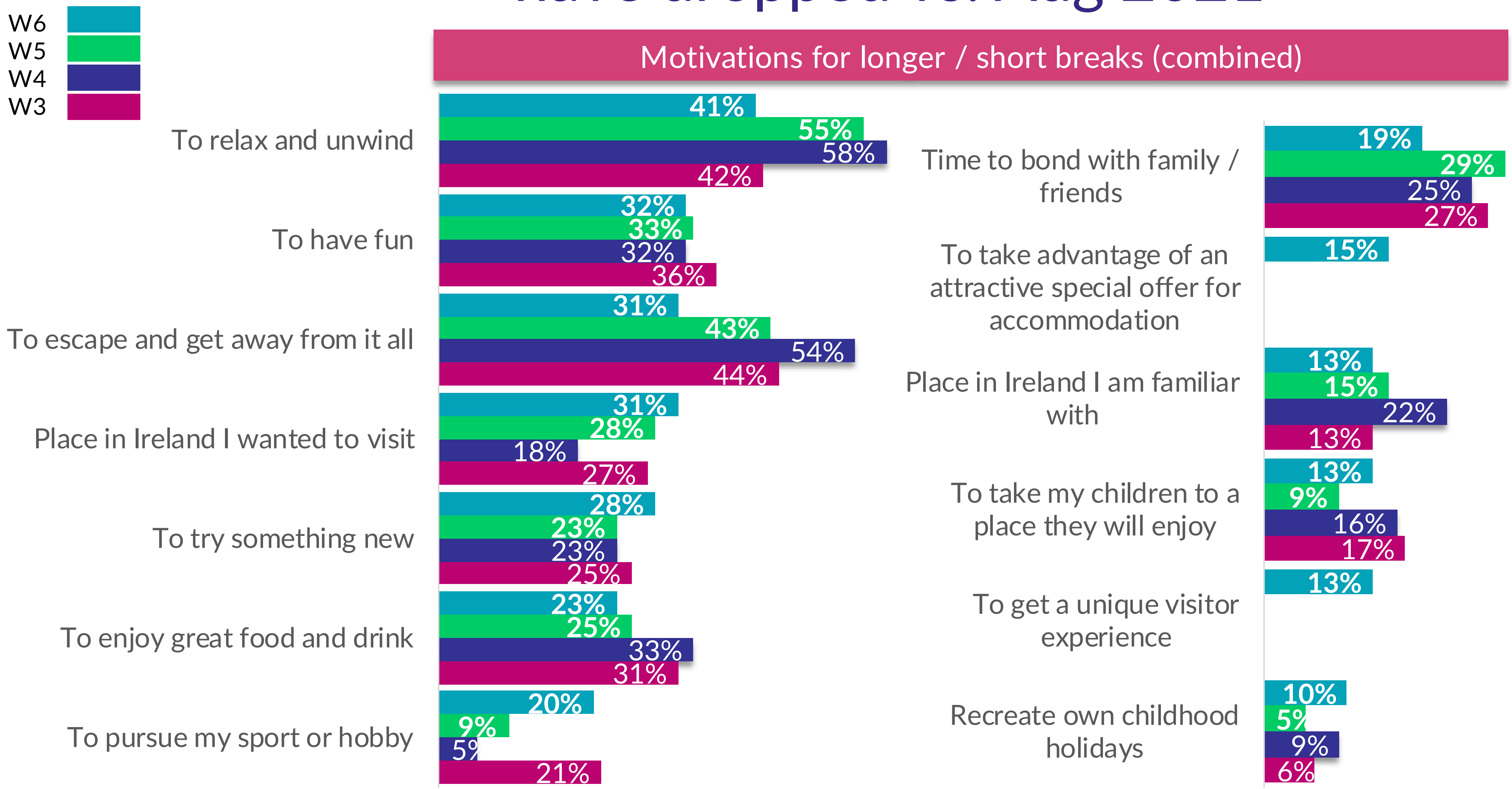
November	December	January	February	March
5%	16%	19%	14%	33%

29% 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 and **escapism** key reasons for travelling, although they have dropped vs. Aug 2021

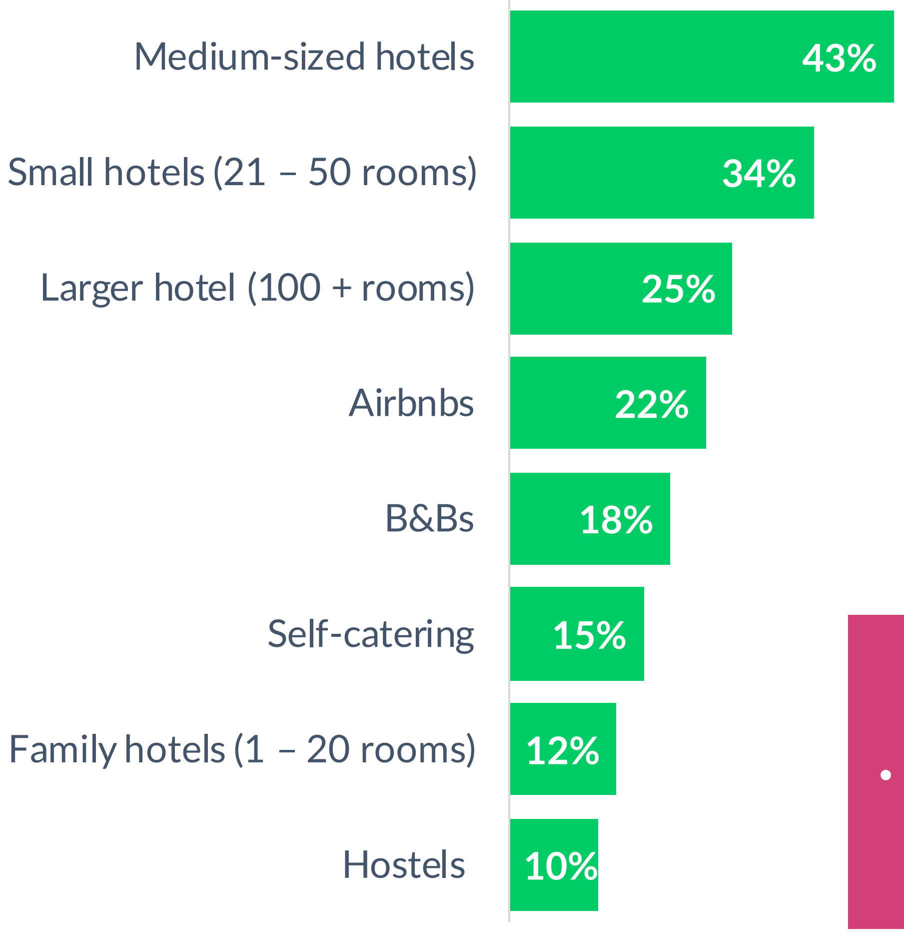


Base = 106

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

Most will be travelling with partners, expect highest volume in medium hotels

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



Who travelling with (long & short combined)

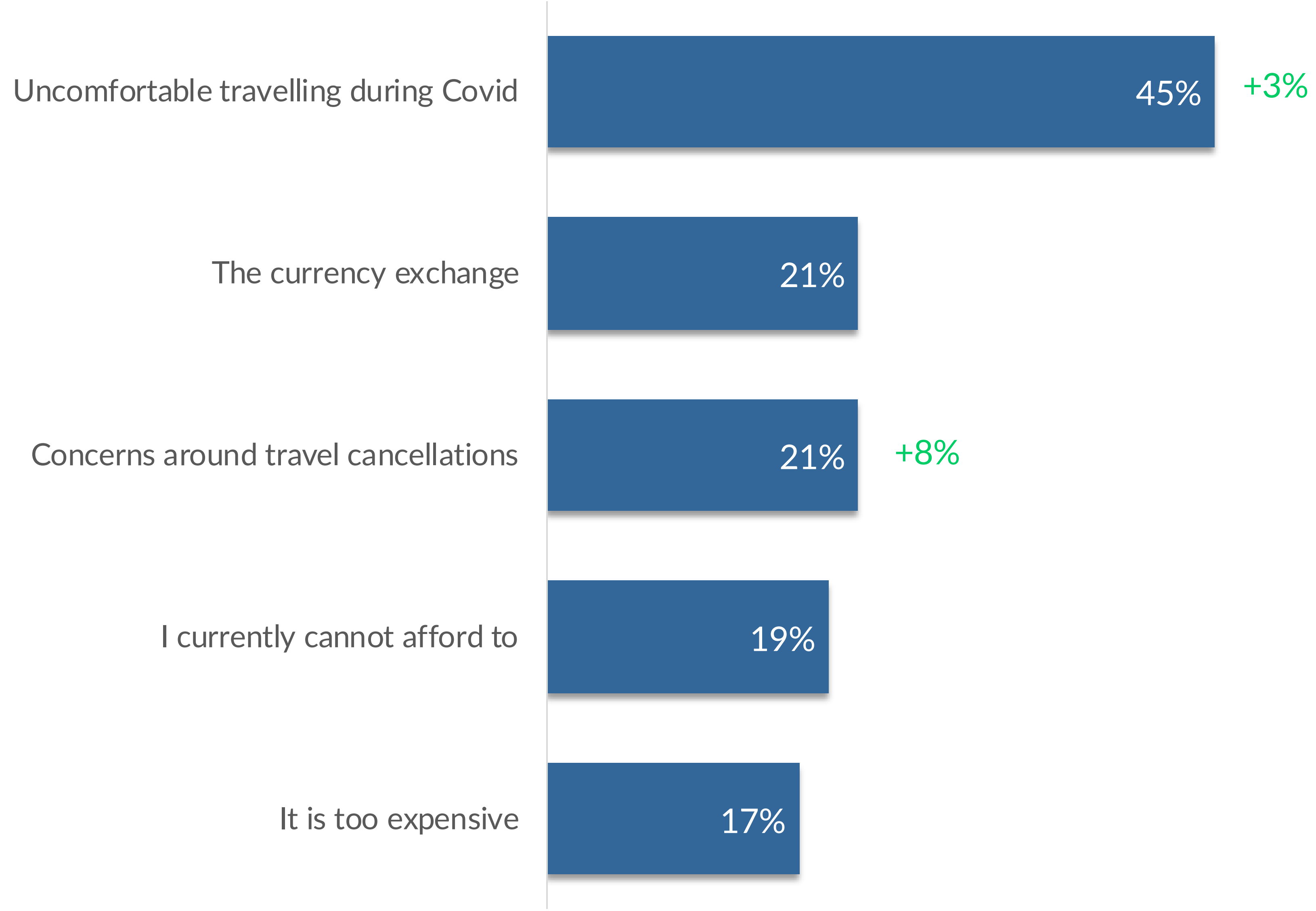
- 44% Partner / spouse
- 35% Immediate family
- 30% Friends

- More likely to be taking their breaks with **their spouse**, then **their families**
- Shorter breaks more likely to be in **medium hotels/ small hotels**; longer breaks more likely to be **medium hotels**

Base = 107

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?

Barriers to taking a break in NI



Increases in concerns around **Covid security** and **travel cancellations**

Base n = 750

E9. And what specifically, if anything, would put you off taking a break in Northern Ireland at the moment?

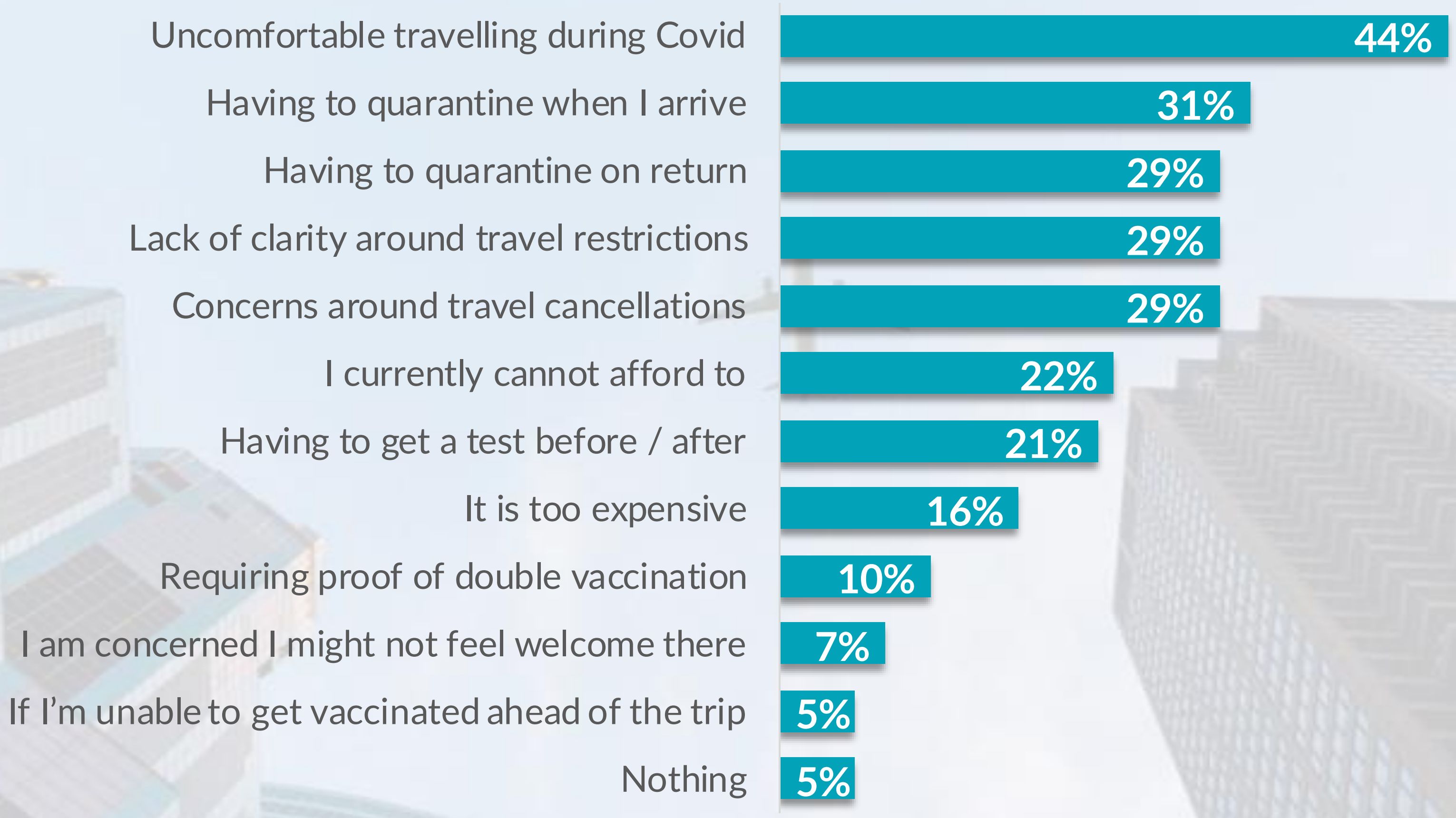
Slight increase in people wanting to take trips abroad, but there is still significant hesitancy around Covid and potential travel restrictions

19% of total sample are considering a break abroad in the next 3-4 months

38% of this cohort are actively planning or have booked their trips

In August, **17%** of total sample were planning on a break abroad – marginal increase

Barriers to taking a break abroad



Base = 750 / 142 – Intending on travelling abroad

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?/ E16. What, if anything, would put you off booking a holiday or short break abroad this year?

Reasonable overnight stay intentions over Christmas – accommodation offers can help encourage this

Likelihood to take a trip to NI for Christmas shopping

15% likely to **stay overnight** in NI this December

19% likely to take a **day trip** for Christmas shopping

Figures when we tested this in 2020 were very similar

Mid-family segment highest likelihood (25%)

Key reasons that would encourage overnight stay

N = 750

E17. How likely would you be to take an overnight break in Northern Ireland for mainly Christmas shopping purposes (e.g. non-grocery shopping) this Christmas? / E18. And how likely would you be to take a day trip in Northern Ireland for mainly Christmas shopping purposes (e.g. non-grocery shopping) this Christmas? / E20. What would be the main reasons that would encourage you to take an overnight shopping break in Northern Ireland?

Market Comparison

Travel Intent

NI travel intent grows in both markets – but especially in NI, where confidence is higher

NI short break intent up 2% in ROI; up 10% in NI
March 2022 top month for both markets

'Relax and unwind' remains top trip motivation in both markets

Staycation intent similar in both markets

We had previously seen NI residents less likely to consider an NI trip than ROI residents an ROI trip – these figures are now in line with one another

For more information, please contact: insights@tourismni.com