# Tourism Northern Ireland Consumer Sentiment Research

*NI Market*

January 2023 Report (Wave 10)

SPARK The Strategic Insight Agency

TOURISM NORTHERN IRELAND

# Research background

# Research background & objectives

This is the **10th wave** of our consumer sentiment research for Northern Ireland (NI). We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how pertinent issues such as cost of living increases will impact on consumer spend and holiday/short break intentions.

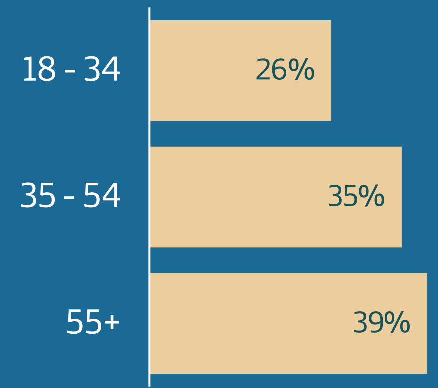
**The research objectives:**

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

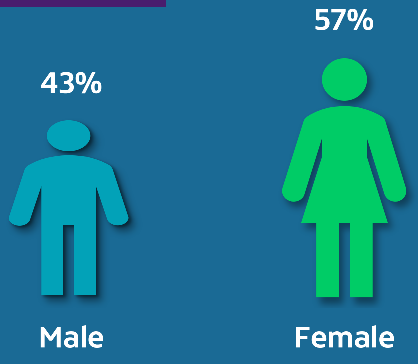
# Sample - We spoke to a robust, nationally representative sample in Northern Ireland

Full sample n=400

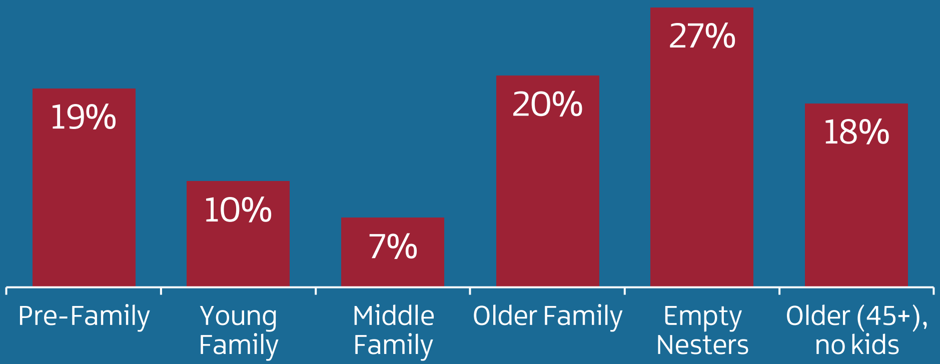
## Age



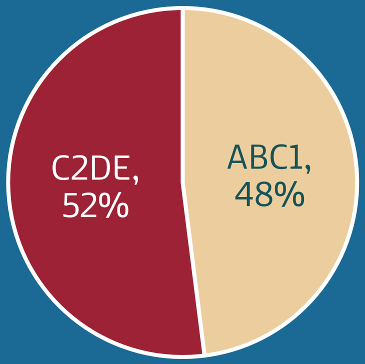

## Gender



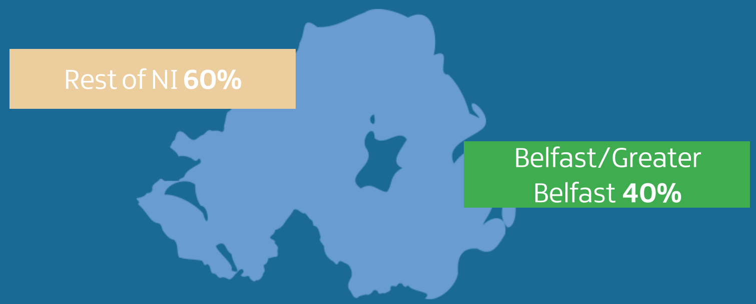

## Lifestage




## Socio




## Region




Fieldwork was conducted between 9th and 23rd December 2022

# Key takeaways

## Optimism and excitement when looking ahead to this year – but anxiety remains

- 33% said they feel optimistic about 2023 and one quarter said they feel excited – but a further 25% said they feel anxious.
- Those with kids and in the 35-54 age bracket in particular still have concerns about cost of living and this will likely mean there is caution about spending money on travelling within NI.

## But it looks like we are past the peak of cost of living concerns

- However, things are moving in the right direction. The number saying they expect to be "significantly" affected by cost of living drops by 14 percentage points. And the focus on reduction in spending is less than when tested in October – in particular, the number saying they'll be making no changes to spending on eating out and going on day trips goes up significantly; we also see this effect (although less so) for holidays within NI.
- There is caution about spending on experiences / holidays, although a third still want to treat themselves to unique experiences – and this is driven by under-35s and the Social Instagrammers segment.

## Strong value for money and experiences scores for those taking trips within NI

- Value for money score holds steady for NI, and still well above key competitors.
- Results show a high Net Promoter score (NPS) (22) for trips taken within NI, with 2 in 5 also saying their trip exceeded their expectations. 9 in 10 also said they found people welcoming on trips taken in NI.

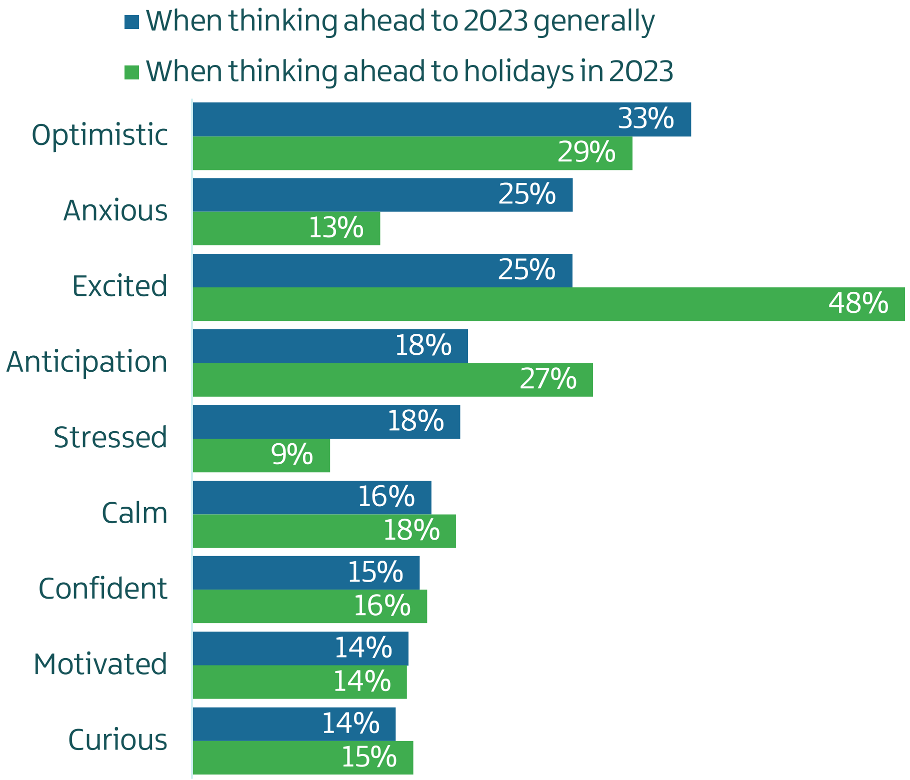
## And trip intentions steady – many are looking for short breaks to get a chance to relax

- When it comes to trip intentions, short break plans are holding steady and just over a third are planning one in the next 3-4 months. Long break intentions also stable vs. previous few waves but are being overtaken by desire to go abroad / travel to GB or ROI now that most feel comfortable travelling.
- Relaxation and escapism were very much the key drivers for trips within NI in this wave, with cost of living and Christmas at the forefront of people's minds in this December survey – and 7 in 10 said they're looking for a laid-back holiday, an increase of 7 percentage points.

# Cost of living

# Most feeling positive about 2023 – sense of optimism and excitement particularly when it comes to thinking about holidays. Some anxiety especially among those without kids

Top emotions felt...




**77%** selected at least one positive emotion when looking ahead to 2023

More likely to select a positive emotion:

- Over-55s 83%
- Empty nesters 85%

**37%** selected at least one negative emotion

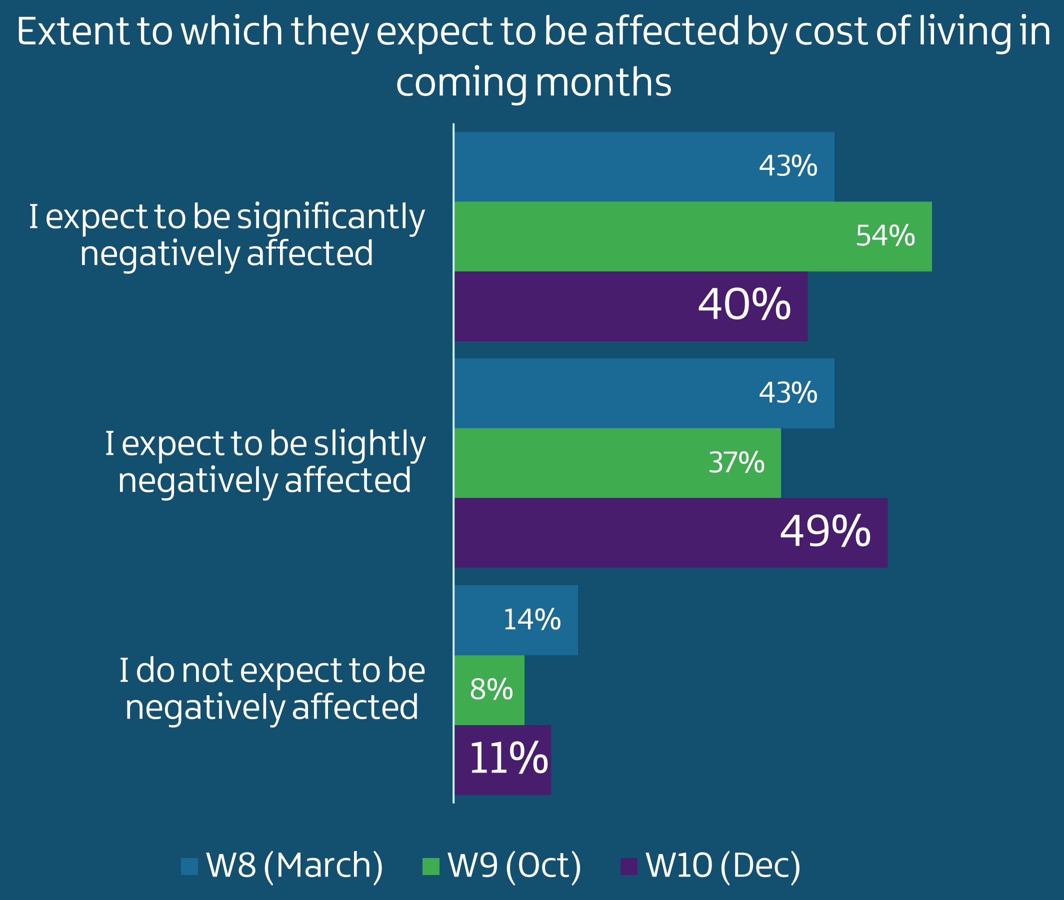
More likely to select a negative emotion:

- 35-54s 42%
- Pre-family 44%
- Older, no kids 49%

Base n= 400

F12. Which of the following emotions do you feel...

# Big drop in number expecting to be "significantly" affected by cost of living in NI. Older consumers in particular feel confident they won't be hit too hard




More likely to be **significantly affected**:

- Older family 50%
- 35-54 49%
- Female 45%

Less likely to be **significantly affected**:

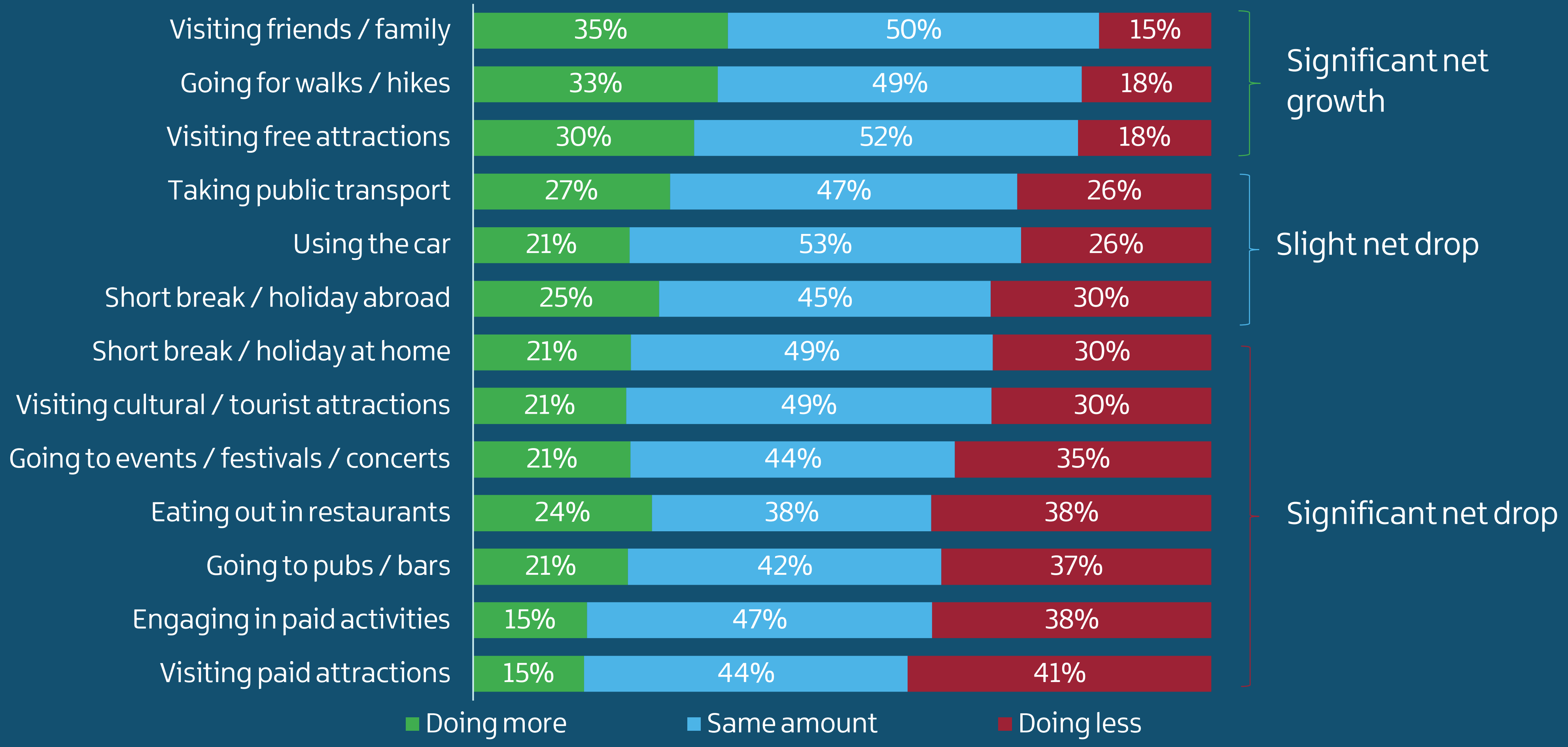
- 55+ 31%
- Male 32%
- Empty nesters 33%
- Quality Seekers 33%

Base n = 400

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

# Less likelihood to engage in paid activities / visit paid attractions, although still interest in outdoor activities and free attractions

What they expect to do more or less vs. this time last year



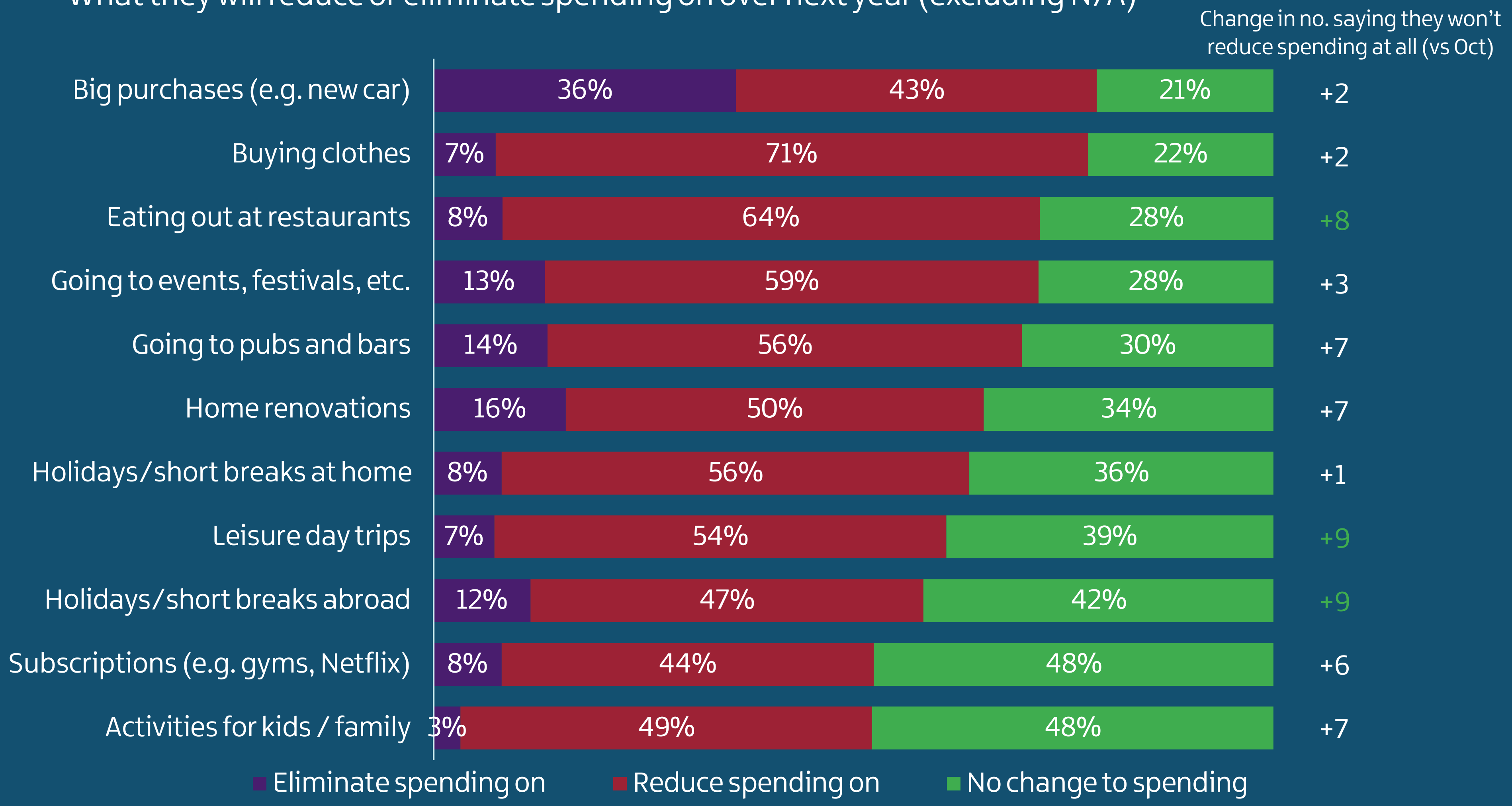

All fall slightly vs. last wave – events / attractions see most significant drop

Base n = 400

F6. Compared to this time last year (i.e. winter 2021), which of the following are you likely to be doing more or less of?

# Slight softening of intent to reduce spend

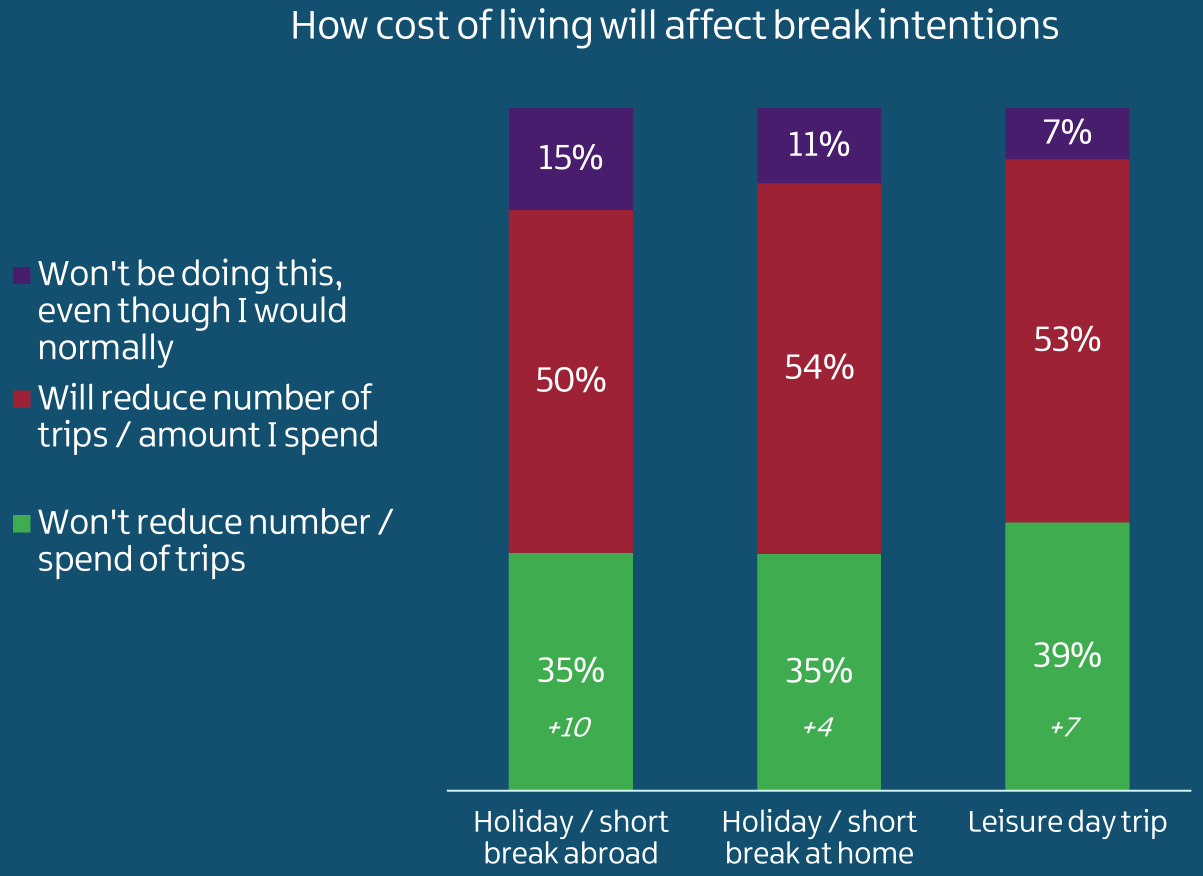
What they will reduce or eliminate spending on over next year (excluding N/A)

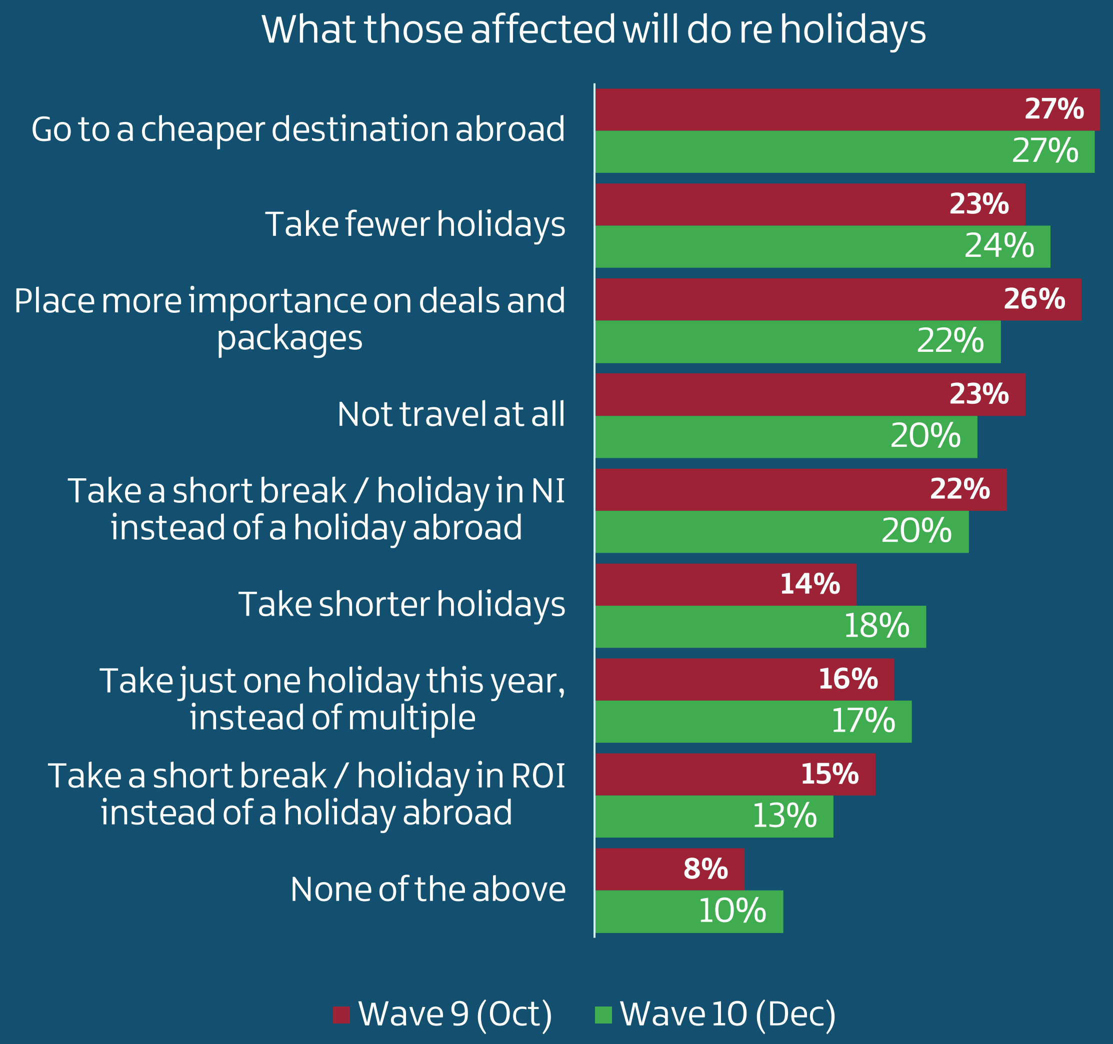



Base n = 400 (excl. N/A)

Please categorise the following activities, taking into account how you expect the cost of living increases to impact your spend on them in the next year...

# Many likely to reduce spend / number of holidays, but number saying they won't reduce number of breaks goes up by 4 percentage points



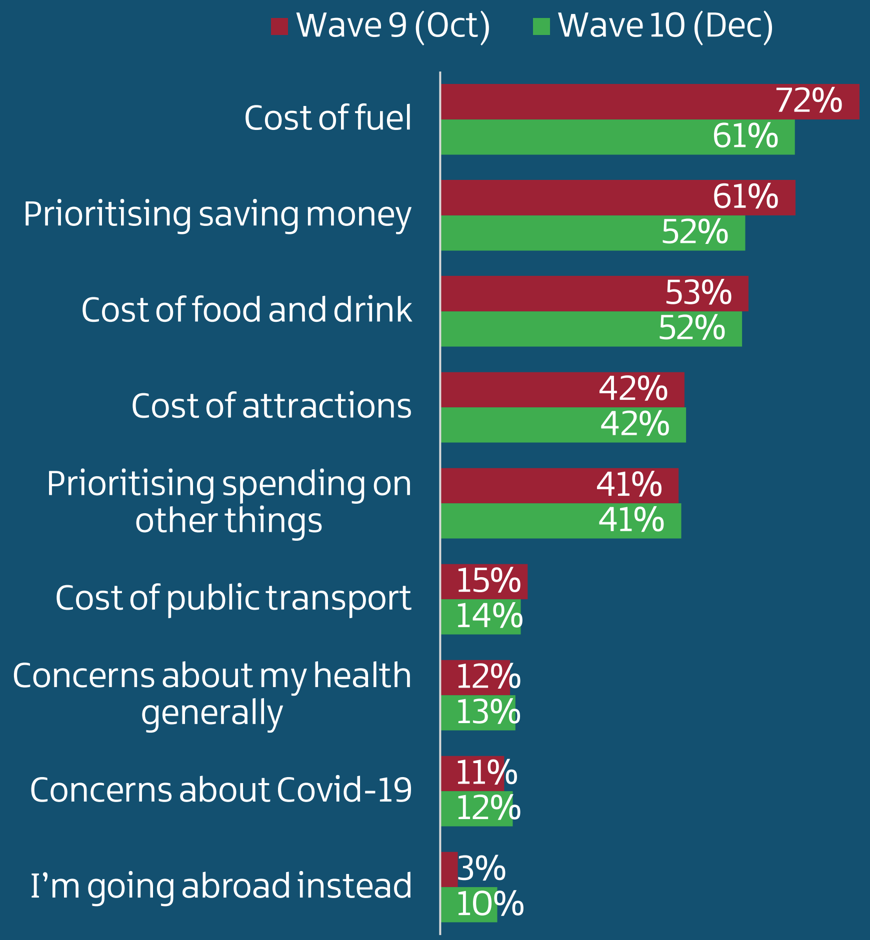

Base n = 400

F9. To what extent would you expect cost of living impacts to change your approach to the following types of holidays or trips? / F2. 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?

# Key impact on day trip behaviours will still be to focus on "free things" – with many still reducing day trips due to cost of fuel, although this has dropped considerably

How cost of living will affect day trip planning


Those who'll reduce day trips or travel closer to home – key reasons

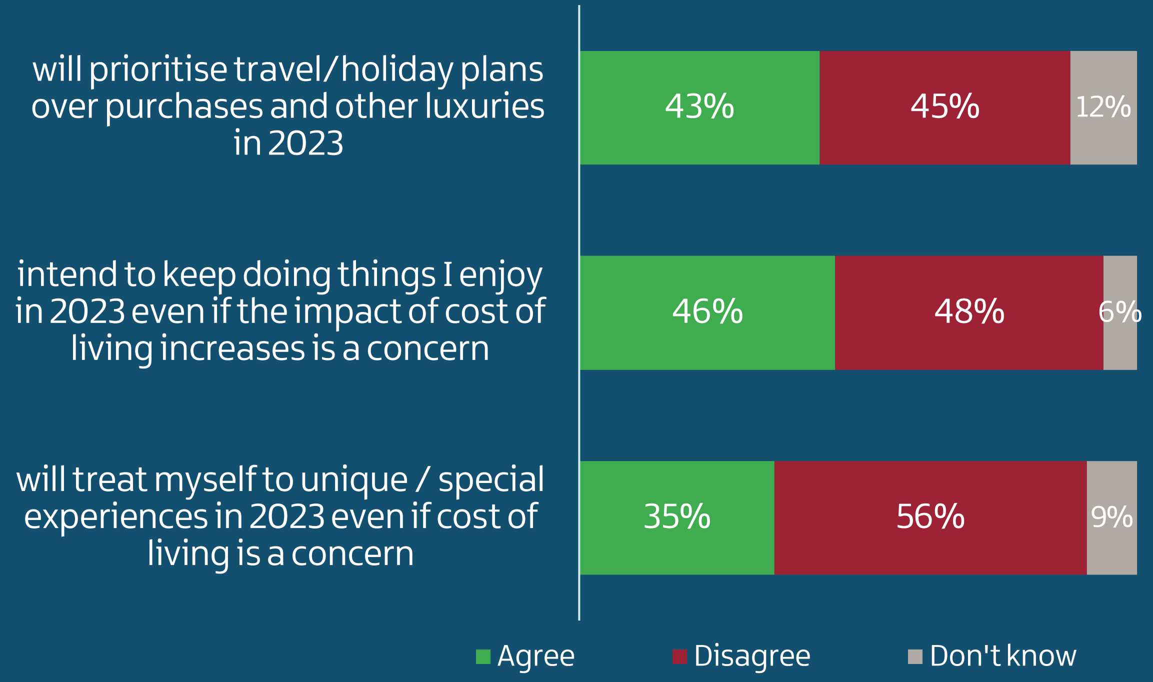



Base n = 400 / 190

F10. Which of the following would you consider doing as a result of recent increases in cost of living if planning a day trip in Northern Ireland in the next few months? / F11. You mentioned you will take fewer day trips or travel closer to home when it comes to day trips. What are the key motivations for this?

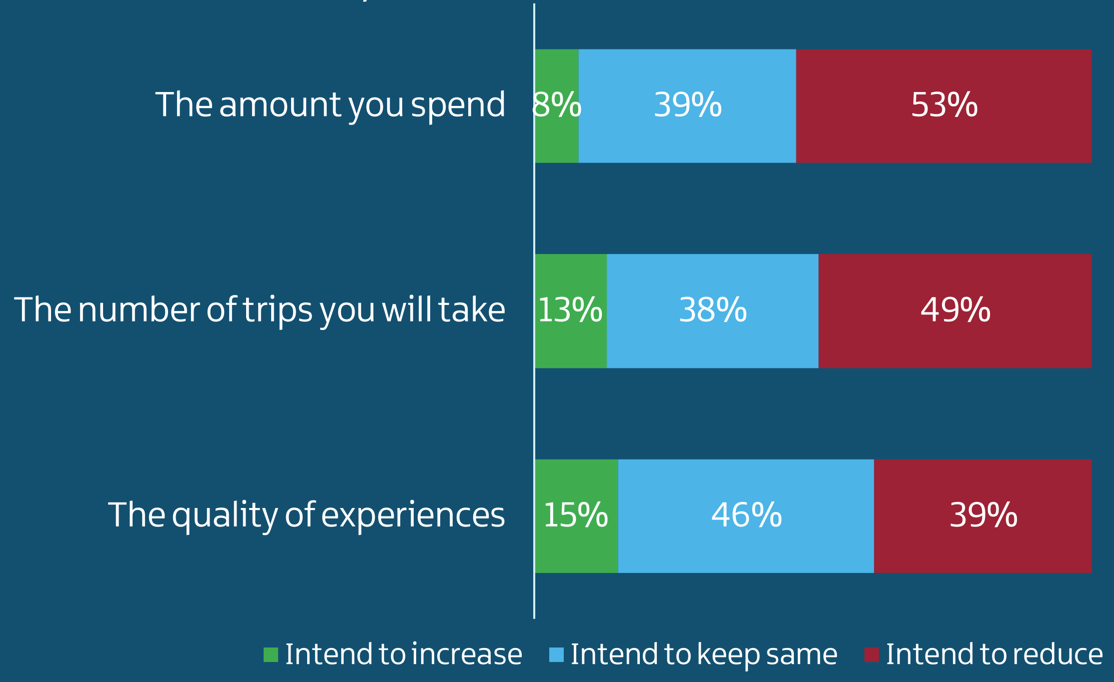
# Around a third are keen to treat themselves to unique / special experiences this year in spite of cost of living – primarily younger, pre-family cohort driving this

% who agree: "I…"




More likely to say they'll treat themselves to unique / special experiences:
- Social Instagrammers 49%
- Pre-family 48%
- 18-34s 47%
- ABC1 40%

When it comes to holidays / short breaks, do they plan to increase / reduce…




More likely to say they'll increase quality of experiences in 2023:
- Social Instagrammers 27%
- 18-34s 24%
- Pre-family 23%

Base n = 400

F14. To what extent do you agree or disagree with the following statements about cost of living impacts in 2023? / F15. And thinking ahead to any trips you might take in 2023, to what extent do you intend to increase or reduce…?

# **Market comparison** – Cost of living

## Slightly more negative picture in NI – but both markets in a more positive place generally

- Those in NI slightly more likely to give a negative emotion when prompted on feelings for 2023 (37% vs. 33% in ROI)
- **And roughly the same picture in terms of expecting to be negatively affected by cost of living in coming months (40% vs. 41% significantly impacted in ROI)**

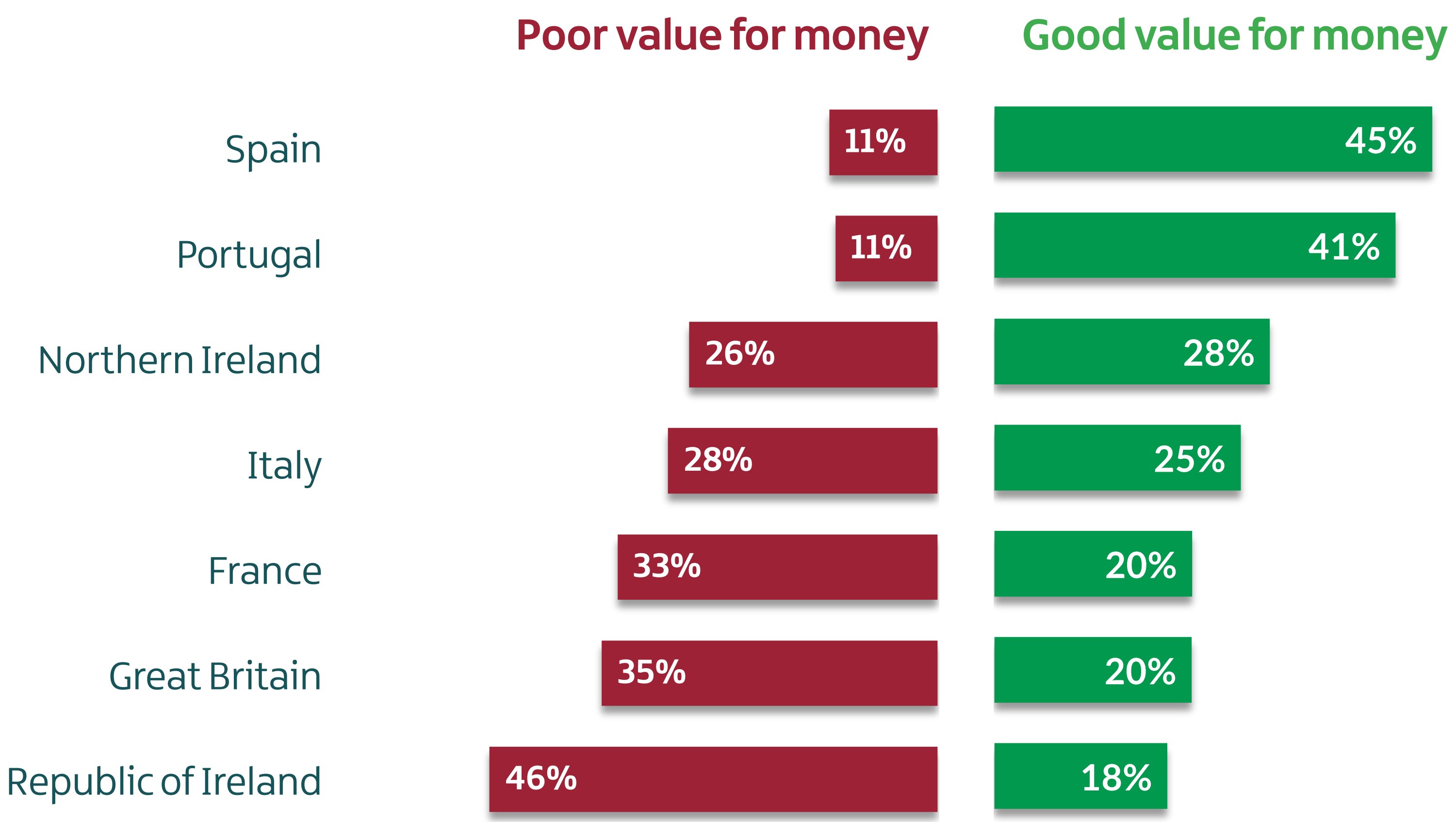
## Less of a desire for unique / special experiences for those in NI

- Slight increase in NI, of number saying they won't reduce spending on holidays at home (up 4 percentage points to 35%) but not as big an increase as in ROI (where it grew 9 percentage points to 38%)
- And those in NI also less adventurous when it comes to experiences – 35% said they'd treat themselves to unique experiences in 2023, compared to 45% in ROI

# Value for money

# Value for money score for NI stable; still well ahead of most key competitors

## Value for money




## Net Score

| | Dec | Oct | Mar |
|---|---|---|---|
| Spain | +34 | +38 | +36 |
| Portugal | +31 | | |
| Northern Ireland | +3 | +3 | +16 |
| Italy | -2 | -1 | -1 |
| France | -13 | -10 | -14 |
| Great Britain | -14 | -7 | -1 |
| Republic of Ireland | -28 | -26 | -19 |

Base n = 400

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

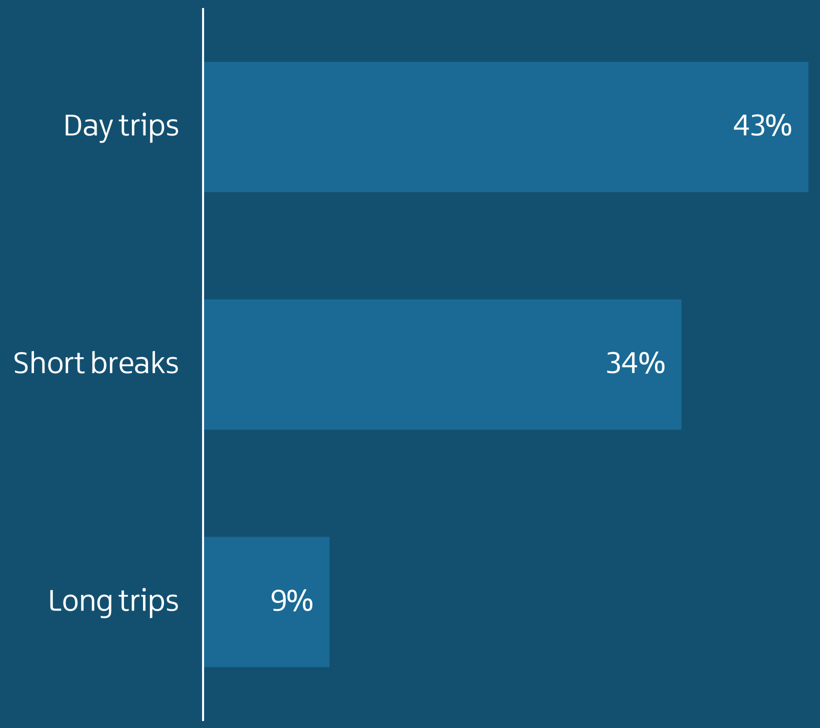
# Travel experiences

# Just over a third have taken a trip in NI in 2022 – roughly the same as the number who travelled abroad

**36%**

have taken a **short or long break** in NI in 2022

% of total sample who took...




Other than NI...

32% took a break in ROI

36% went abroad

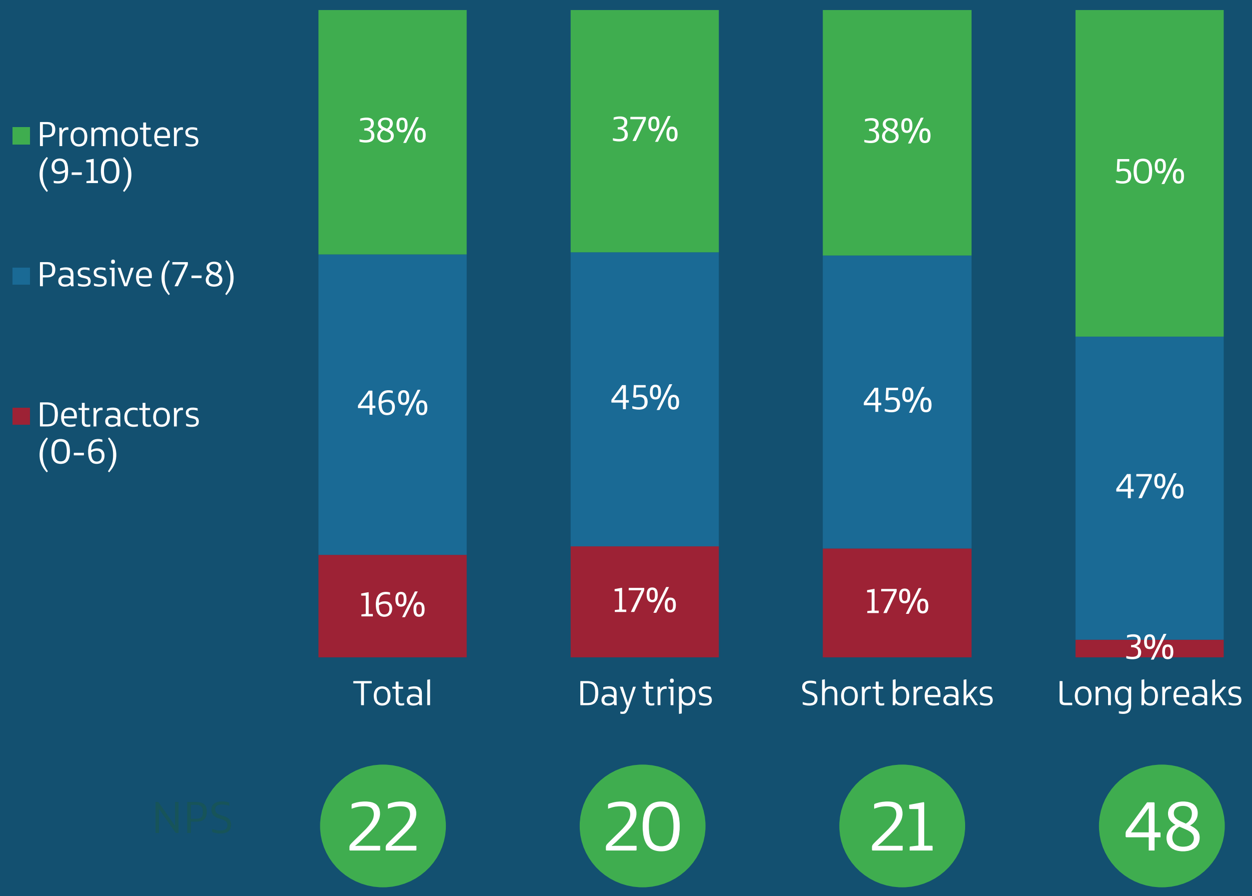
30% didn't travel at all

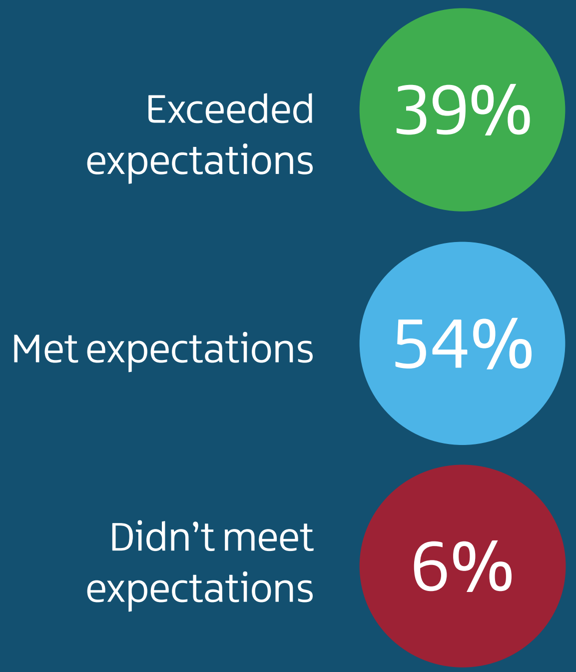
Base n = 400

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 2022?

# Strong Net Promote Score (NPS) for NI residents travelling within NI – 20 or above across trip lengths too

NPS among those who visited in 2022




*NPS is calculated as promoters minus detractors. Any score above 0 is a good score; +20 or higher is an excellent score*

Base n = 212 (combined visitors 2022); 180 (day); 143 (short); 36 (long – caution low base)

D12. Thinking about Northern Ireland as a holiday or short break destination, to what extent would you be likely to recommend it to others? / D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations?

# Three quarters likely to take further trips in NI and abroad

| | Of those who travelled in NI | Of those who took a trip abroad |
|---|---|---|
| Would be likely to take another trip in 2023 | 75% | 75% |
| Would be unlikely to return | 14% | 15% |

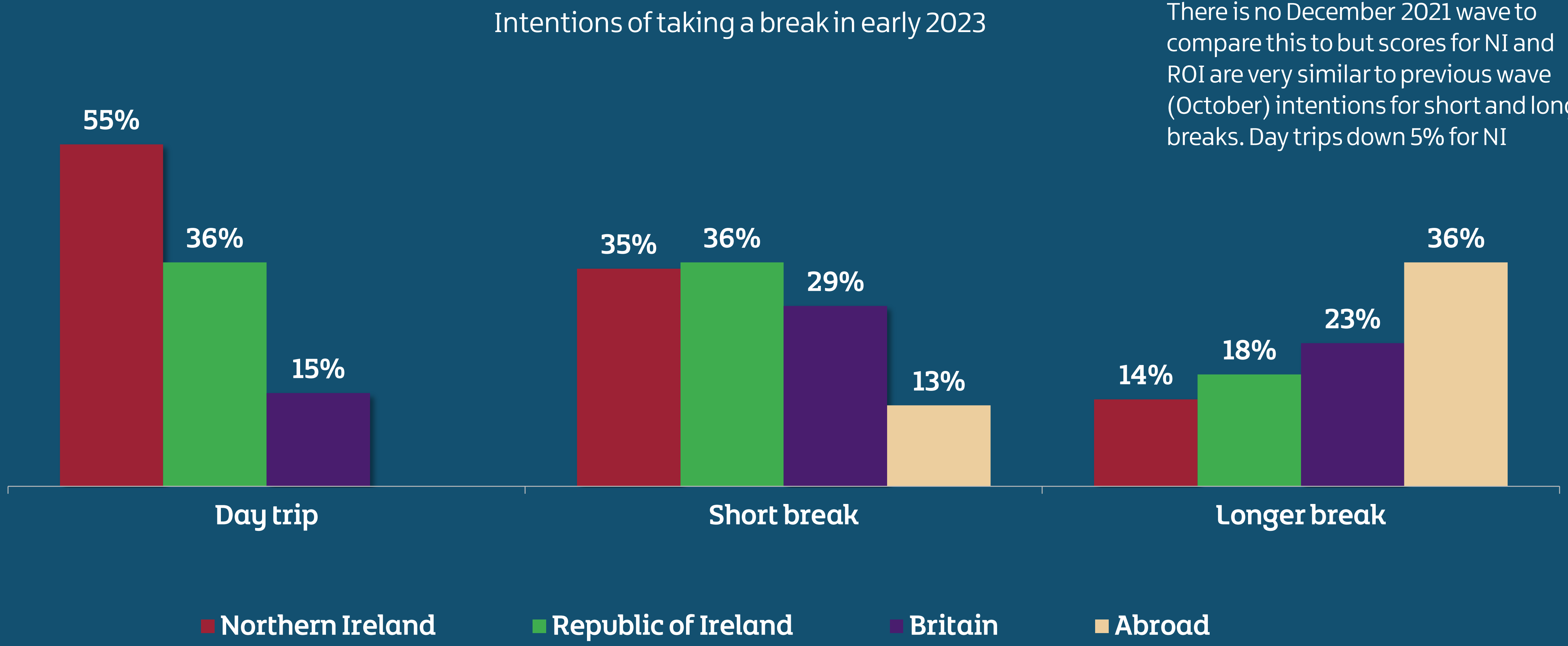
Base n = 212 took a day trip / break in NI / 118 travelled abroad in 2022

D6. How likely would you be to take another break in Northern Ireland in the remainder of 2022 and throughout 2023? / D10. And in general, how likely would you be to travel abroad again in the remainder of 2022 and throughout 2023?

# Travel intent

# Intentions stable against recent waves for short and long breaks – slight dip for day trips

There is no December 2021 wave to compare this to but scores for NI and ROI are very similar to previous wave (October) intentions for short and long breaks. Day trips down 5% for NI



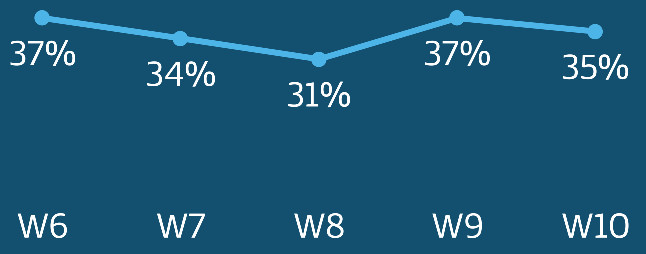

Base n = 400

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 December 2022 - April 2023?

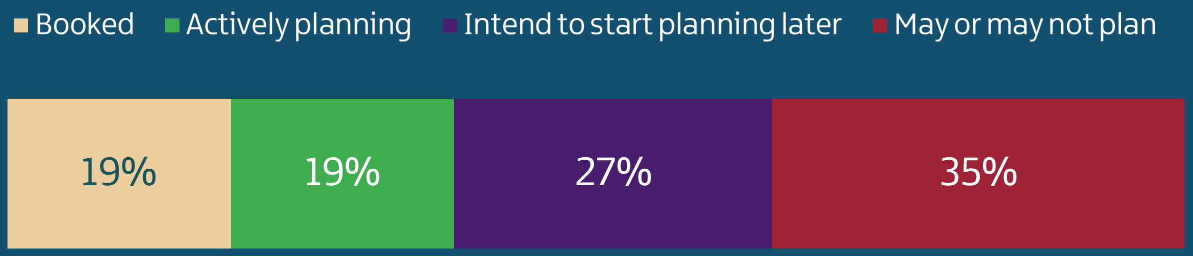
# A third planning short breaks, stable against previous few waves, and 1 in 5 of these have booked

**35%**

are considering a **short break** in NI in early 2023

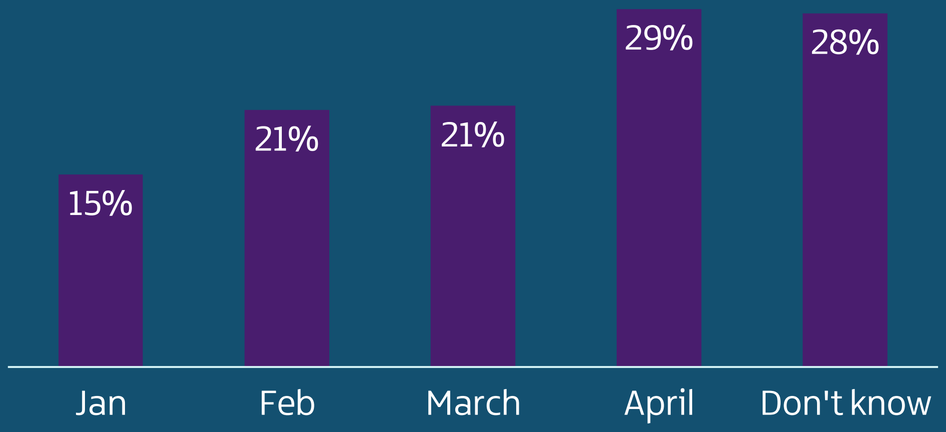



Amount of short break planned




**38%** are actively planning or have booked a trip in NI – **14%** of the total sample

Short break planned for



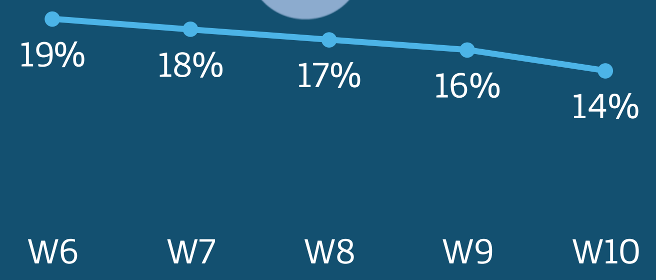

Base n = 400 / 142 planning short break

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 December 2022 - April 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?

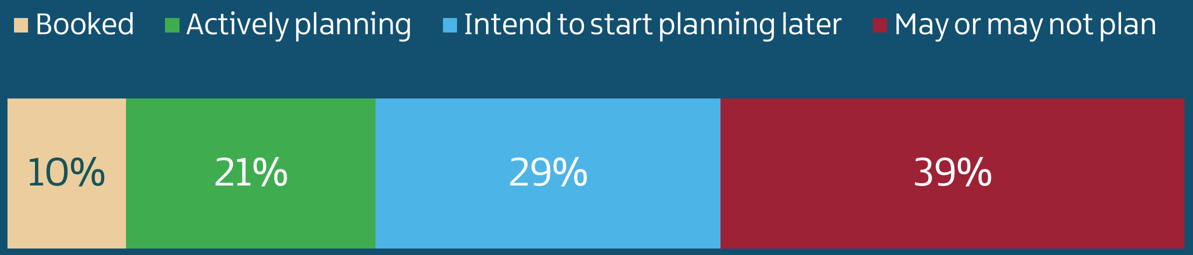
# Long breaks more hit in terms of intentions over past year than short trips

**14%**

are considering a **long break** in NI in early 2023

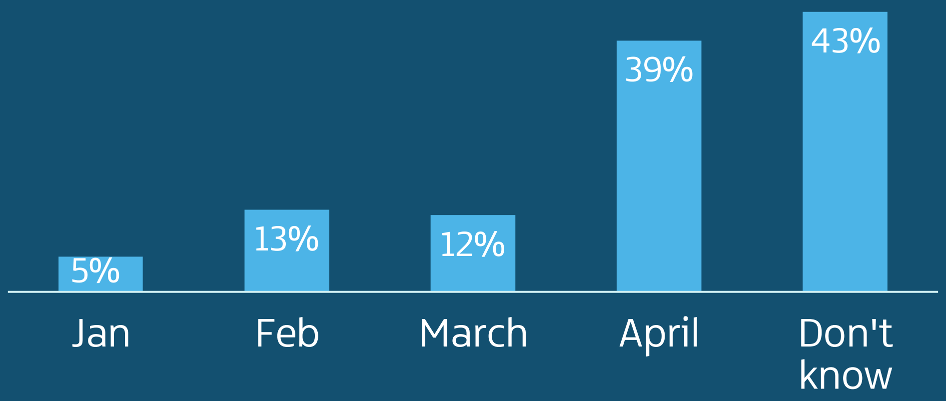



Amount of long break planned




**31%** are actively planning or have booked a trip in NI – **4%** of the total sample

Long break planned for

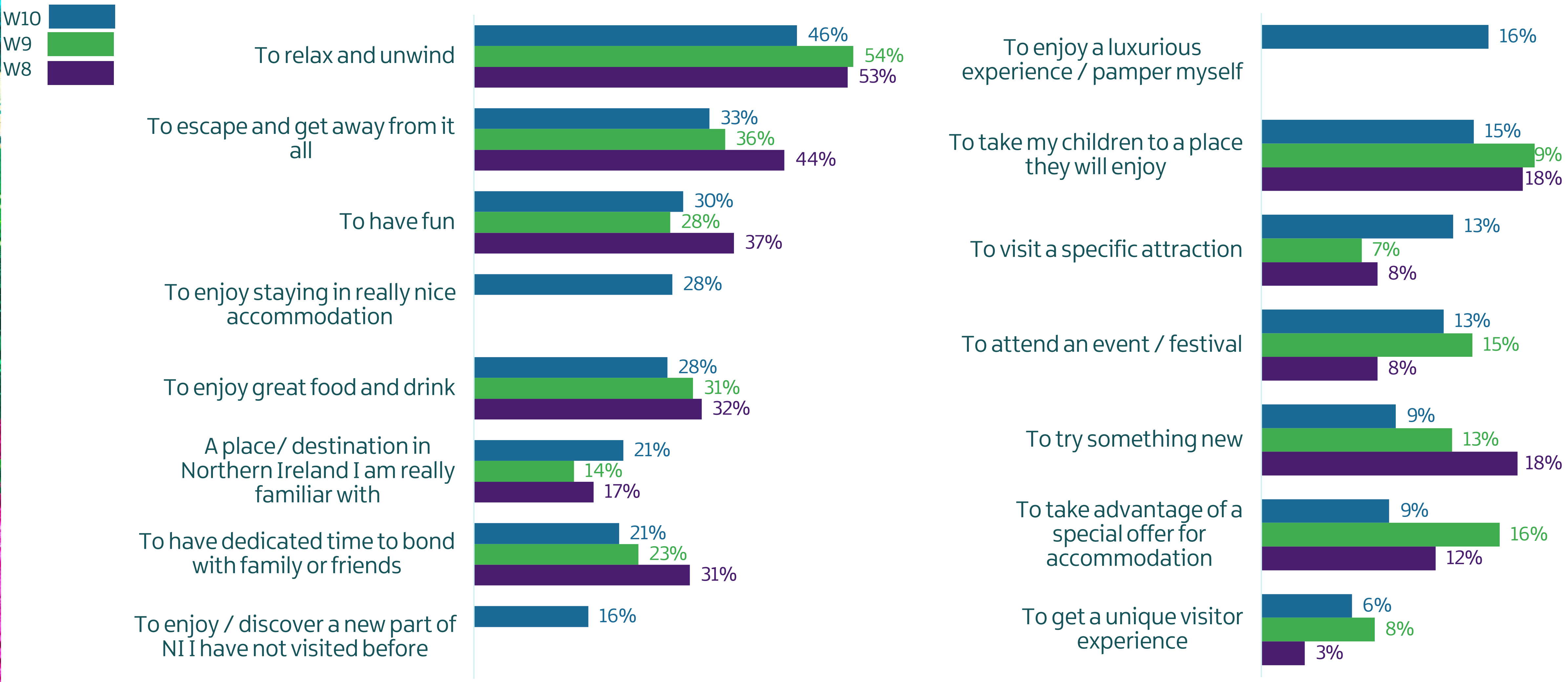



Base n = 400 / 55 planning long break

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in December 2022 – April 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 and escapism top 2 trip motivations; fun also high up for those in NI

Trip motivations (long and short combined)

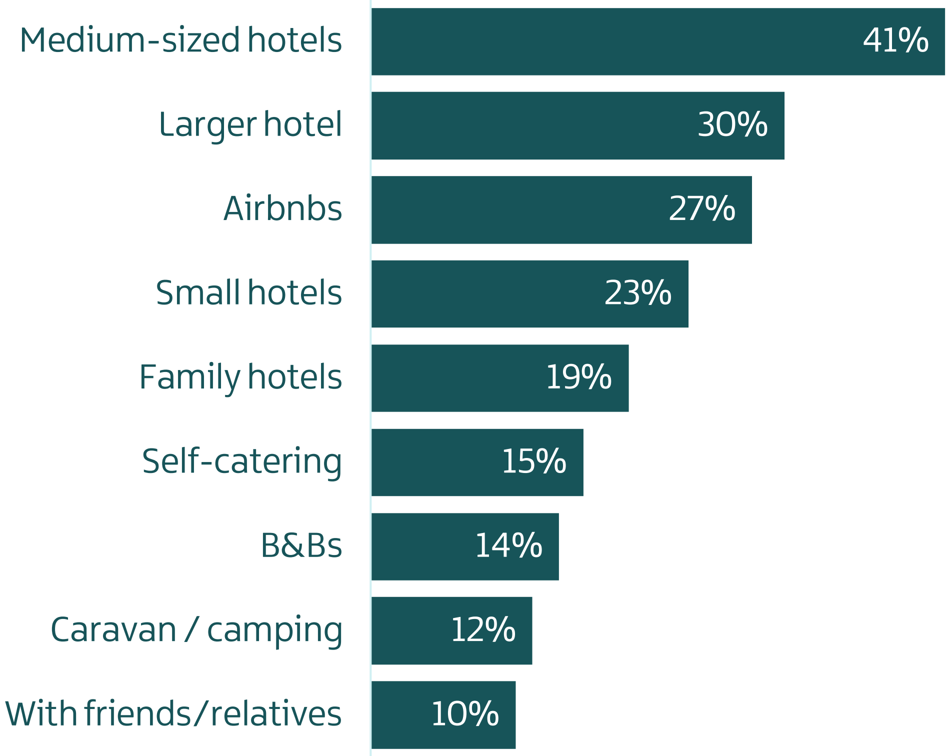



Base n = 99

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

# **Medium hotels** the preferred place to stay in coming months – trend towards these along with family holidays

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




Who travelling with (long & short combined)

- 46% Immediate family — *+7% points vs. Oct*
- 46% Partner / spouse
- 22% Friends

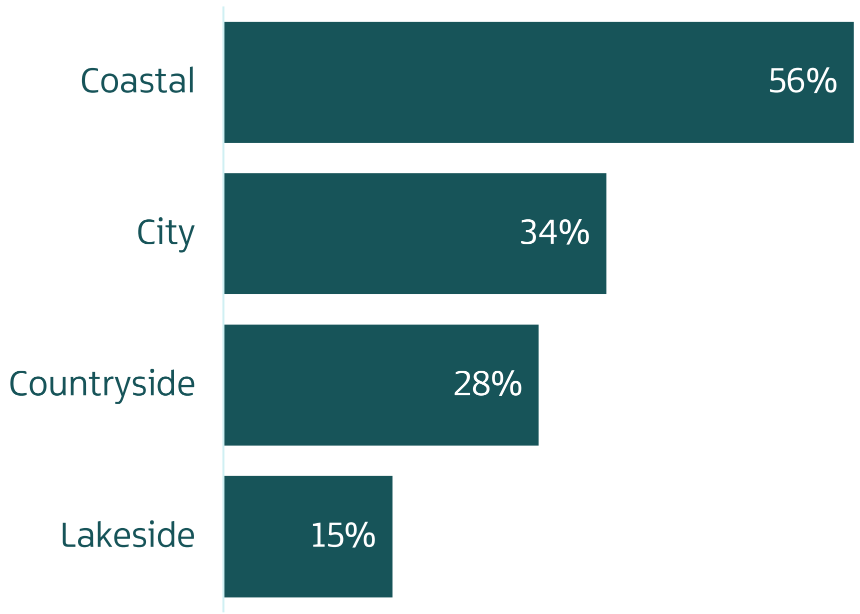
No real change in hierarchy for where staying – although medium-sized hotels goes up by 10 percentage points, along with preference for travelling with immediate family

Base n = 99

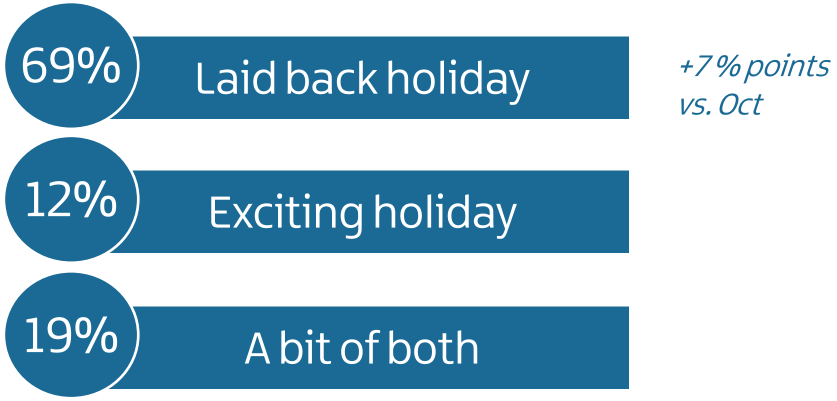
E5. Who do you intend on travelling/sharing your holiday(s) with? / E7. Thinking about your upcoming break(s) in Northern Ireland, what type of accommodation do you expect to stay in?

# Most looking for **relaxing trips** (even more so than before) and plan to head to the coast for holidays. 4 in 5 would like to bring their dog with them.

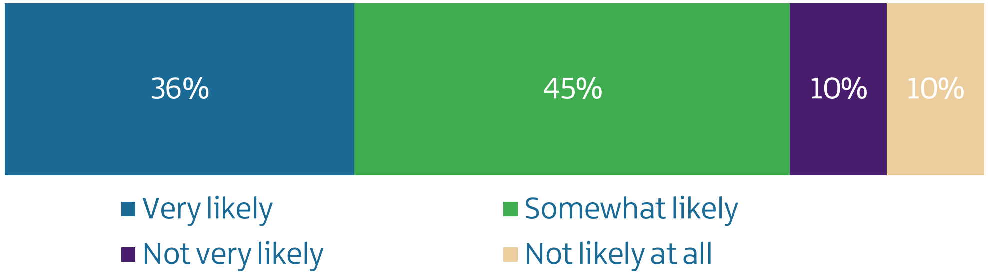
Type of break preferred




Type of trip preferred




Likelihood to bring dog with them (if possible)

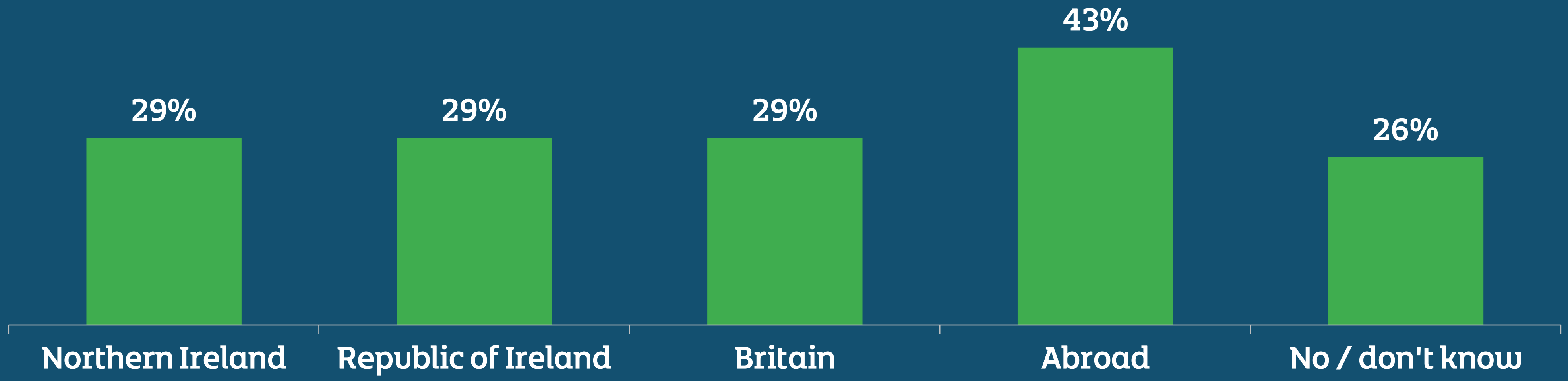



Base n = 99 / 40 have a dog

E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer? / E8b. How likely or unlikely would you be to bring your dog on your upcoming trip(s) in Northern Ireland, if the accommodation you were staying in allowed pets? / E36. Which of the following best describe your upcoming short break(s) or long trip(s) in NI?

# Around 1 in 3 planning trips in NI for this summer – a mixture of other types of trip also planned

Intentions of taking a short / long break in May – Aug 2023




Base n= 400

E24a. Would you consider taking a short break or longer holiday in any of the following between May and August 2023?

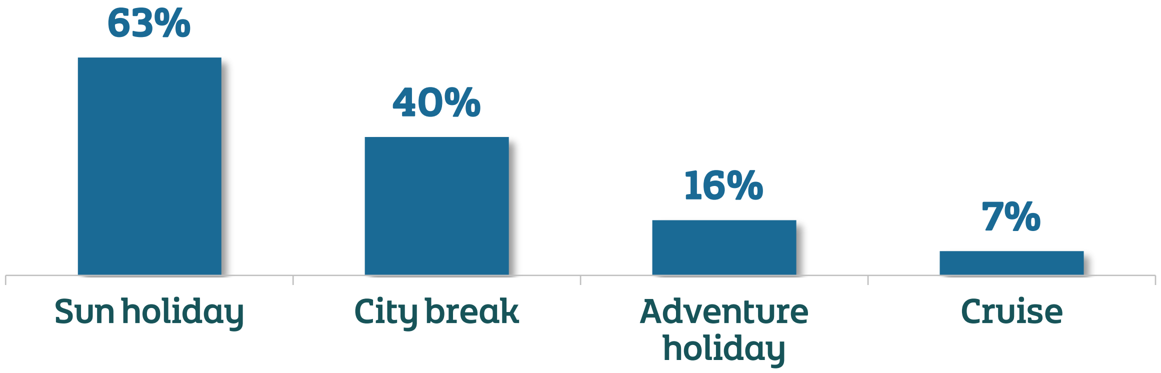
# Number considering trips abroad lower in NI than in ROI – but still continuing to grow. Sun holidays the main trips planned, likely in late summer

**56%** of total sample are considering a break abroad in the next 8 months

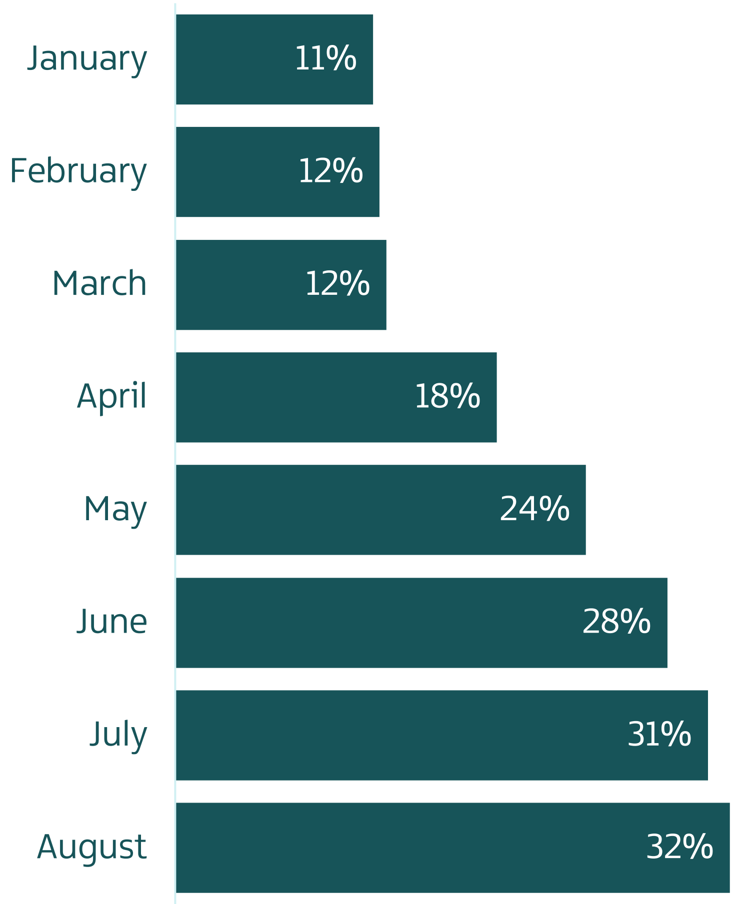
**57%** of this cohort are actively planning or have booked their trips

Trip intentions have grown by 12 percentage points (vs. last wave – *which, didn't include summer*) to highest ever

What type of trip are you considering?




When trips abroad are planned for




Base n = 224 considering trip abroad

E29. In which of the following months are you considering travelling? / E14. Have you booked or thought about planning this trip abroad? / E15. What type(s) of holiday or short break abroad are you considering?

# Market comparison – Trip expectations

## Trip planning stable in both markets

- No significant changes across both markets in number of NI short / long breaks planned
- **Slight downward trend against last few years as trip abroad intentions continue to grow**

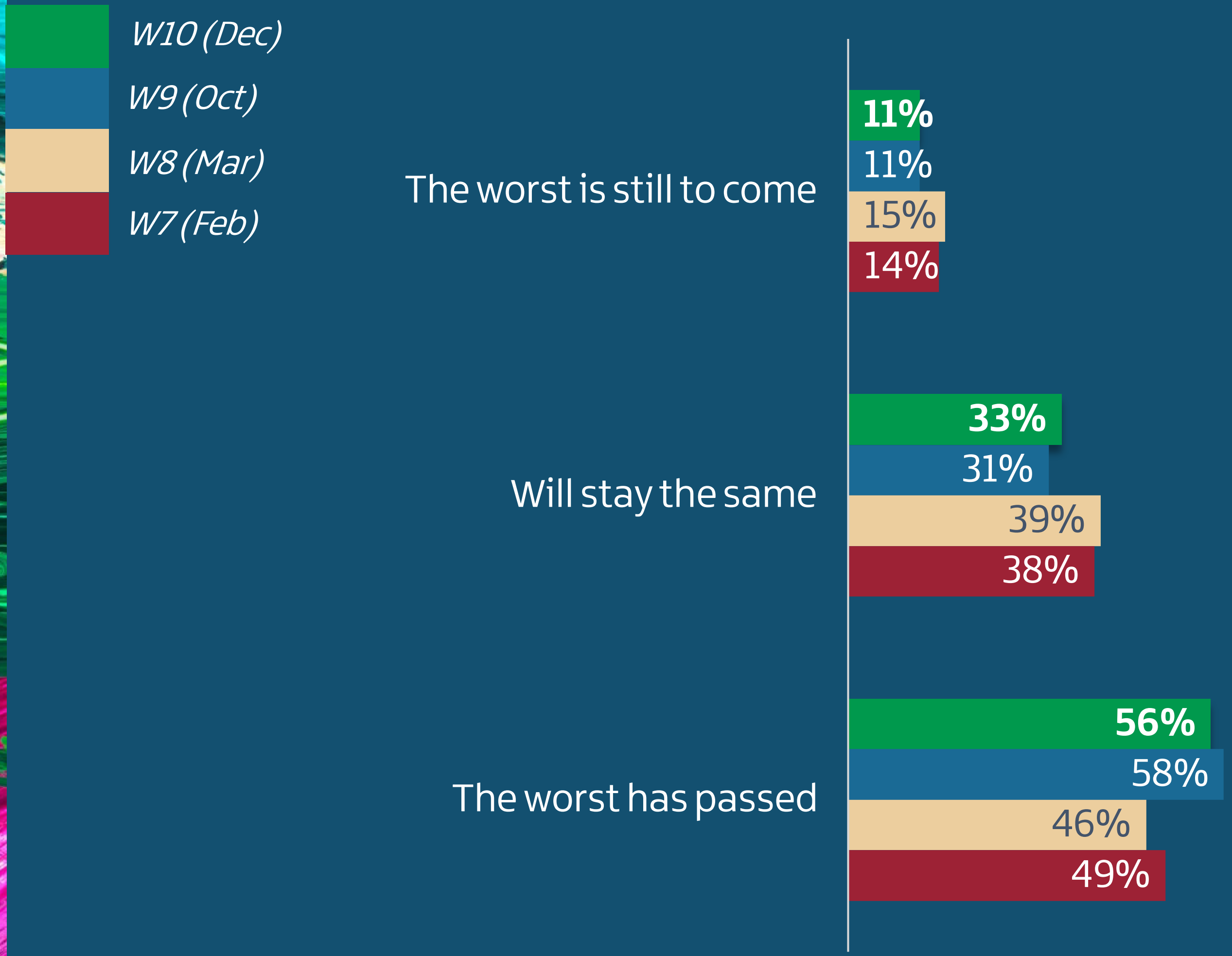
## Chance to relax / unwind very important at the moment

- With Christmas coming up (at time of fieldwork) and costs increasing, a chance to relax and unwind is high up there as a reason for trips in NI for both markets

# Covid-19 and tourism

# Covid outlook for next month – in a strong place since start of the year in NI, with just 1 in 10 saying things will get worse this month

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



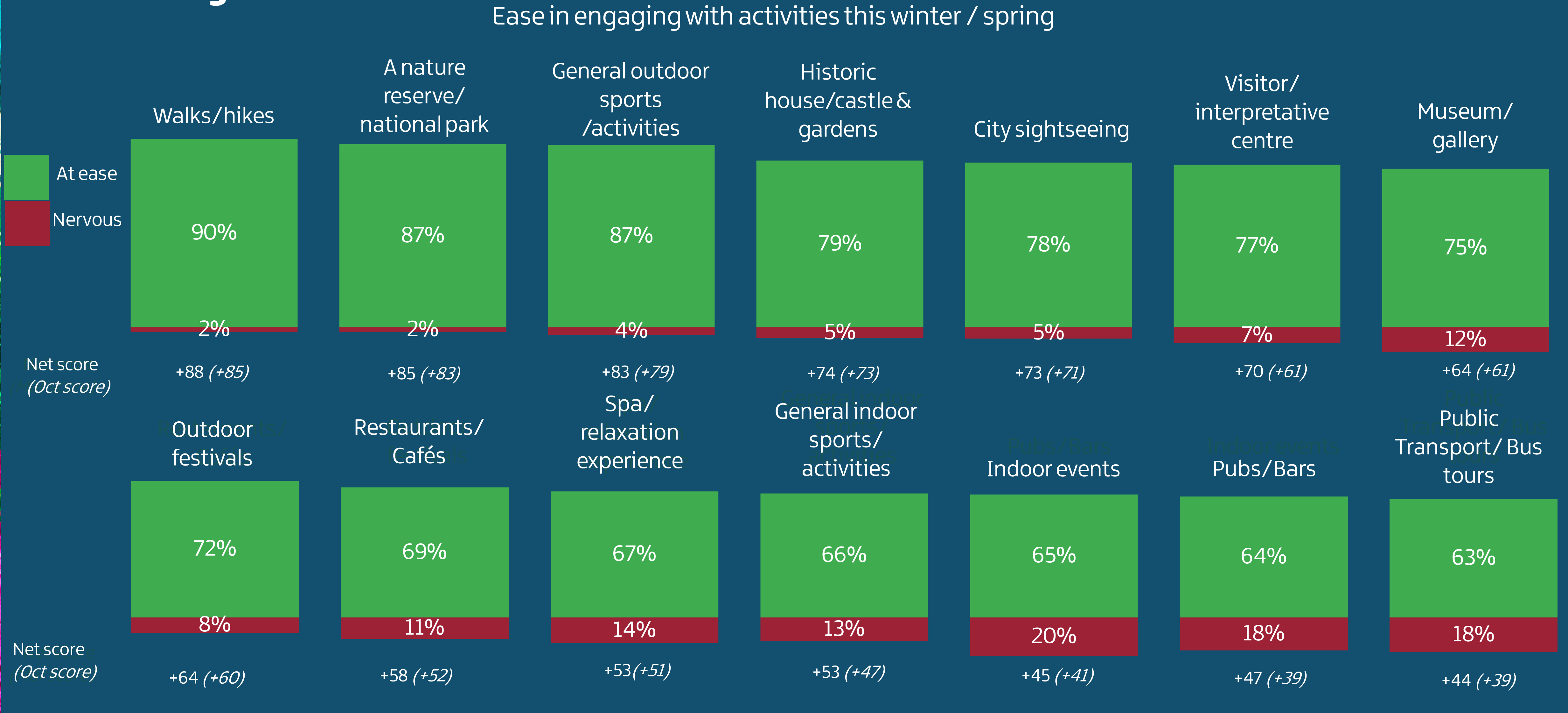

**No group over-indexing for more negative outlook when it comes to Covid – relatively stable across demographics**

**More positive outlook** among Aspiring Families (65%)

Base n = 400

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?

# Net comfort with activities grows – particularly for pubs / restaurants. Clear that Northern Ireland has entered something of a post-Covid mentality

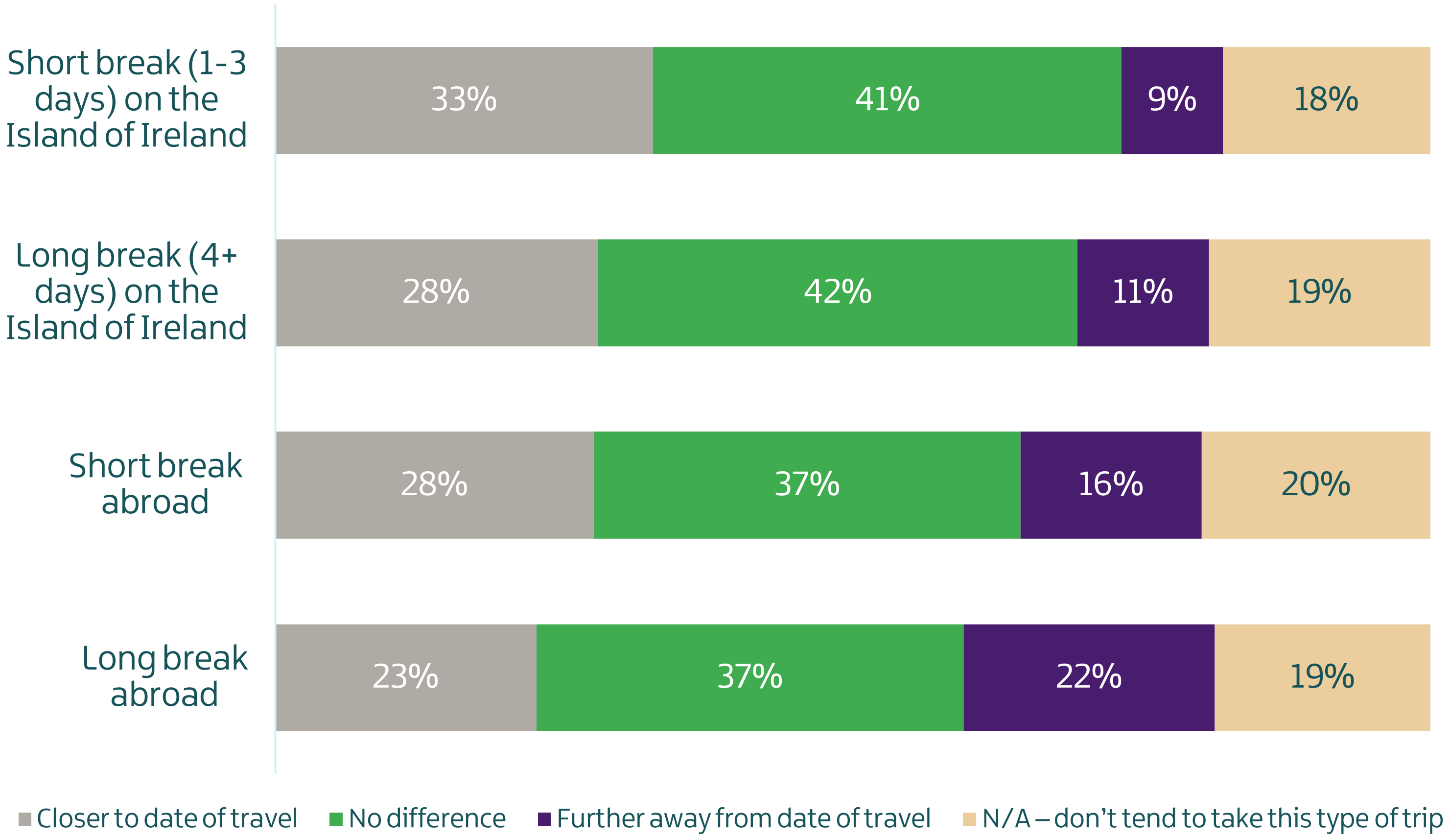



Base n = 400

B4. How do you currently feel about engaging in these activities over the remainder of December 2022 and into 2023?

# Particularly for Island of Ireland breaks, many would still book closer to date of travel than they would have pre-Covid

How long they'd book holidays before date of travel (winter / spring 2023)




Base n = 400

B6f. Thinking about the booking process for holidays or short breaks in winter 2022 / spring 2023, would you say you are booking holidays further in advance or closer to the date of travel than before Covid (i.e. pre-2020) for each of the following?

# Recap

# Recap and recommendations

There is significant optimism for 2023, particularly when it comes to holidays – but anxiety persists about cost of living. 88% still expect to be negatively affected.

Moving in the right direction, however, with number “significantly” affected dropping sharply and fewer people likely to reduce spend or volume when it comes to day trips, eating out, and experiences. Younger people and pre-family lifestages in particular are keen not to be held back by cost of living.

Value for money score holds steady for NI, and still well above key competitors. Value for money perceptions for ROI and GB have dropped since the last research was done in October 2022.

High NPS score (22) for trips taken within NI, with 2 in 5 also saying their trip exceeded their expectations. It looks like many will accommodate both staycations and trips abroad – 75% said they would take another trip in 2023.

When it comes to trip intentions, short break plans are holding steady and just over a third are planning one in the next 3-4 months. Long break intentions also stable vs. previous few waves but are being overtaken by desire to go abroad / travel to GB or ROI now that most feel comfortable travelling.