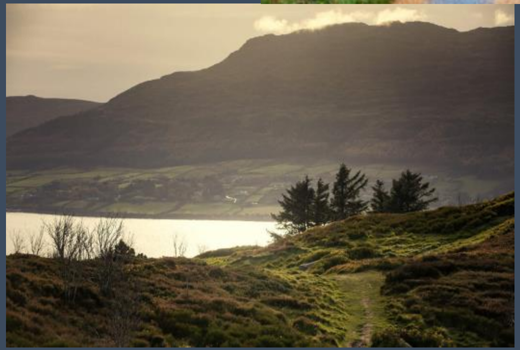
Consumer Sentiment NI Market

October 2022 Report



tourism northernireland

SPARK The Strategic Insight Agency

Research Background

Research background & objectives

This is the 9th wave of consumer sentiment research in the Northern Ireland market. We have continued to monitor consumer attitudes towards travel in NI and elsewhere, keeping an eye on how current issues, e.g. cost of living, have impacted on consumer behaviour and intentions.

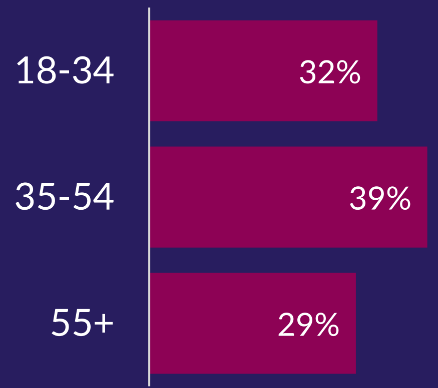
The research objectives:

- Continue to track consumer sentiment towards Covid and explore current attitudes to travel
- Explore perceptions relating to value for money, cost of living increases and attitudes to events
- Understand recent travel experiences in NI
- Assess travel intentions for the remainder of the year and into 2023

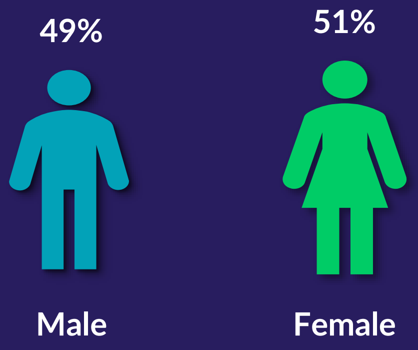
Sample - We spoke to a robust, nationally representative sample in Northern Ireland

Full sample n=411

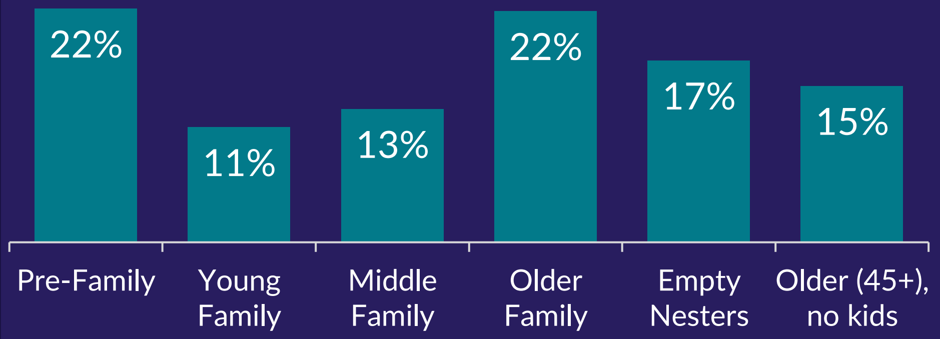
Age



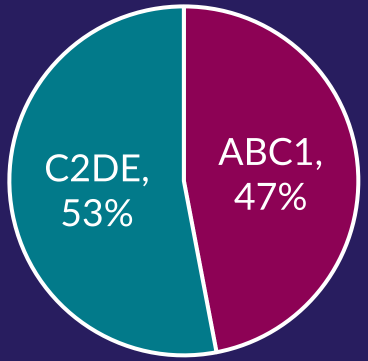
Gender



Lifestage



Socio



Region

Key takeaways

Covid concerns are at their lowest point since the start of this research

- Northern Ireland in a similar, positive position to the Republic of Ireland when it comes to Covid mentality – most now feel comfortable with indoor activities, travelling, and events in a way they didn't back in March of this year.

Positive indications for performance in 2022

- Results point to continued high levels of NI visitor volumes in 2022.
- 2 in 5 NI consumers have had a short or long break in Northern Ireland this year.

But cost of living impacts are being felt

- Around half said they expect to be significantly negatively affected by cost of living impacts in the coming months.
- This does translate into a desire to spend less on most luxuries, including holidays, but at this point in time only a minority intend to forego their holiday at home or abroad.
- Value for money perceptions of NI have declined but remain ahead of ROI.

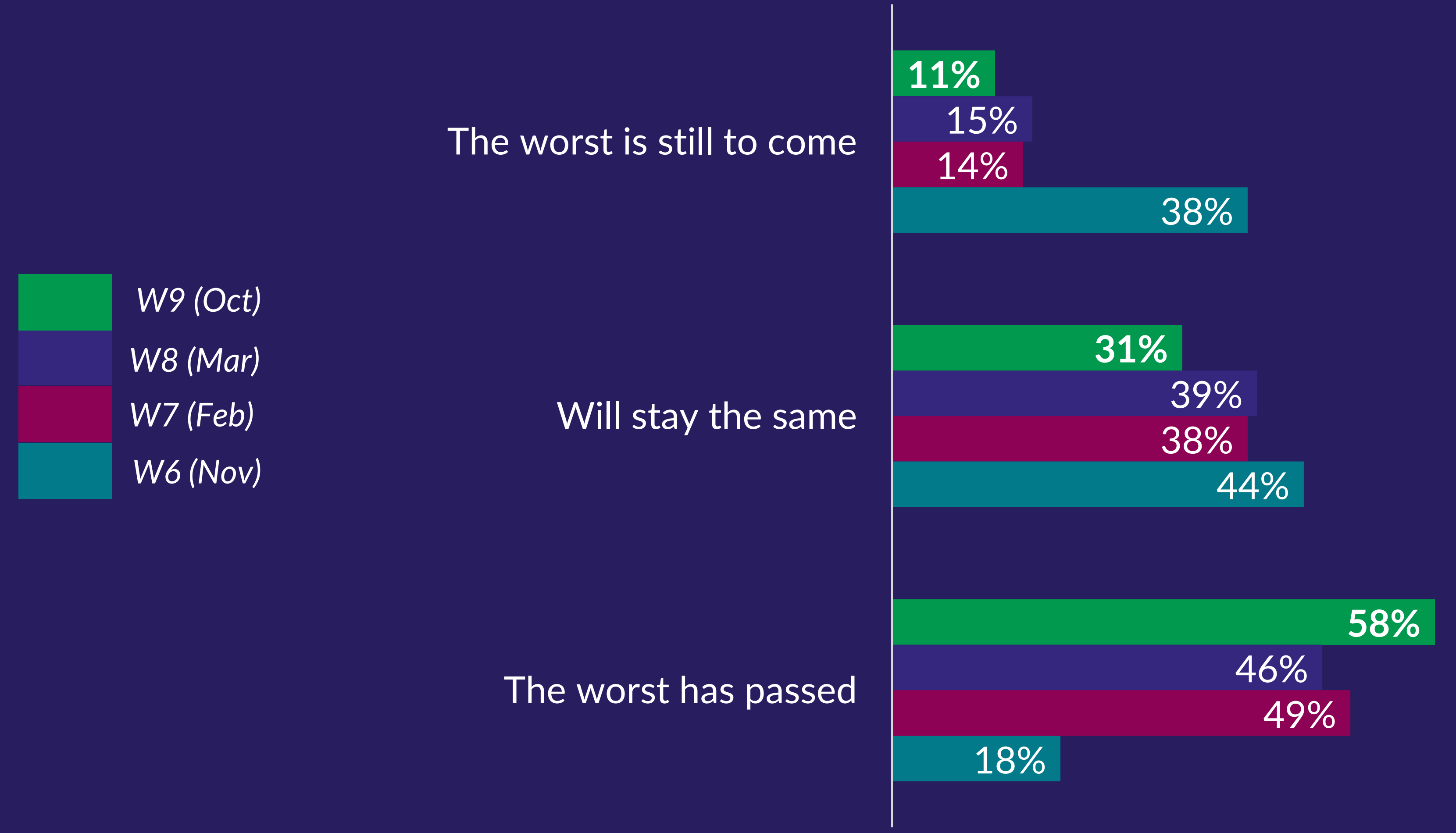
Travel intentions remain stable for NI

- Travel intentions are steady for the remainder of 2022 and for the early months of 2023.
- Increased market competition is also evident however, with increases in the proportion of NI consumers considering taking a break abroad in the next six months.
- ROI consideration also remains strong.

COVID-19 and Tourism

Covid outlook for next month – very significant increase in number saying "the worst has passed", highest since we started collecting data for this question

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



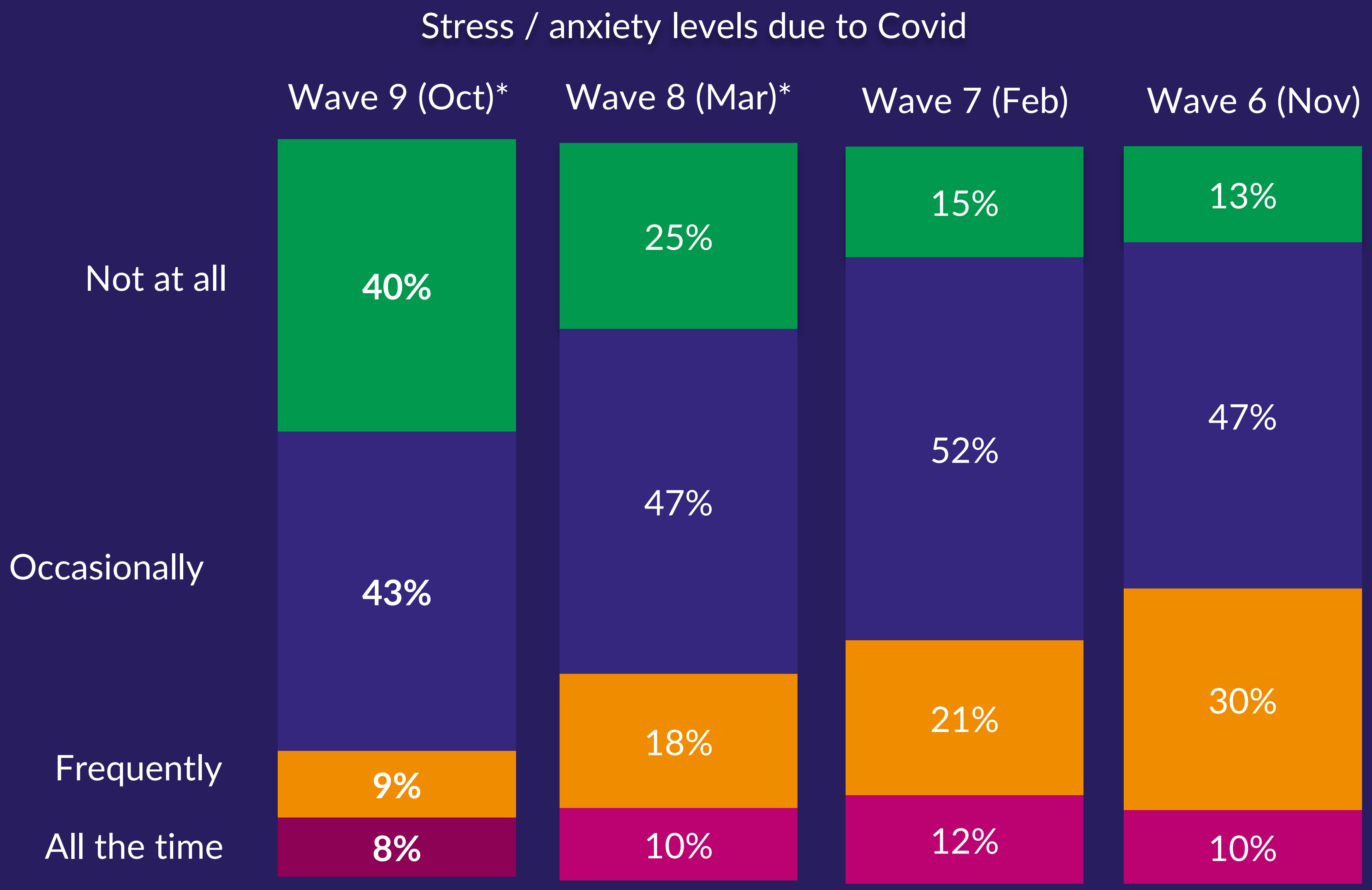
More negative outlook among **over-55s** (17%)

More positive outlook among **18-34s** (70%), **ABC1** (69%), and **females** (66%)

Base n = 411

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?

Stress / anxiety levels relating to Covid drop from 28% "frequently / always stressed" to 19%



Female participants most likely to report being anxious frequently / all the time (**20%**); also **35-54s** (**21%**)

* *NB question changed slightly from March research. Now reflects stress 'due to Covid' over the past month rather than 'during Covid'*

Base n= 411

A1b. How would you describe your stress and anxiety levels due to Covid-19 in the last month?

Market comparison – Covid-19 and tourism

Significant reduction in anxiety in both markets

- **56%** say the worst has passed in ROI; **58%** in NI – in both cases a significant increase.

And most are not generally feeling anxious about Covid

- **82%** say they have been anxious about Covid either ‘not at all’ or ‘occasionally’ in ROI; **83%** in NI.
- The figures for both questions are very similar for the two markets – both with a similarly positive outlook at present.

Current attitudes towards tourism

Sense of safety in UK & Island of Ireland travel almost universal; comfort levels in trips abroad grow significantly but are somewhat behind

Base n = 411

B1. How safe do you think it would be to take a holiday or short break in each of the following locations in the remainder of 2022 (September – December 2022)? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations in early 2023 (i.e. January – April 2023)?

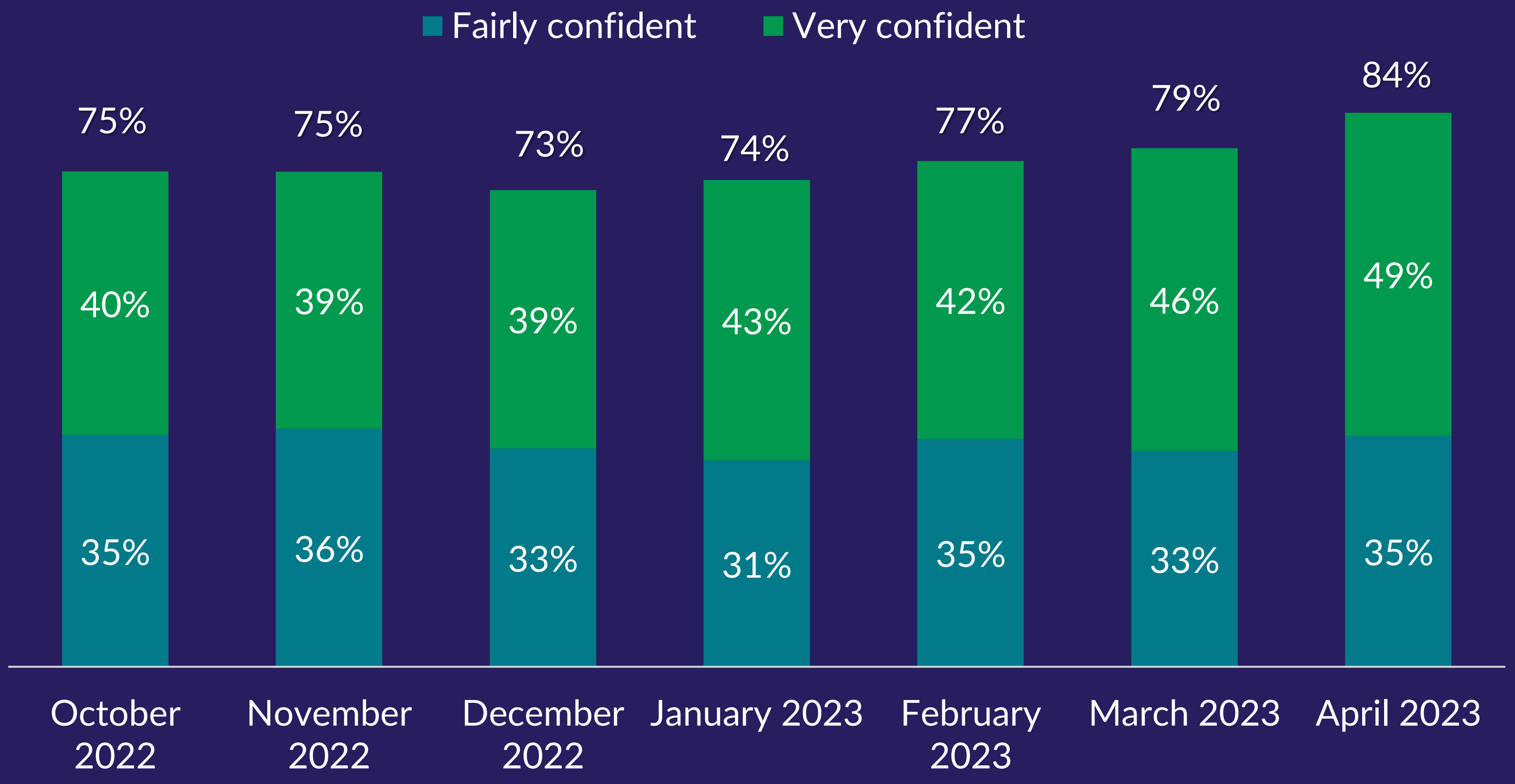
3 in 4 confident a holiday would not be cancelled if booked for this month

75% would be confident in a holiday on the Island of Ireland this month

W8 (Mar): 68%
W7 (Feb): 58%

Confidence lower in particular with C2DEs (34% not confident)

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

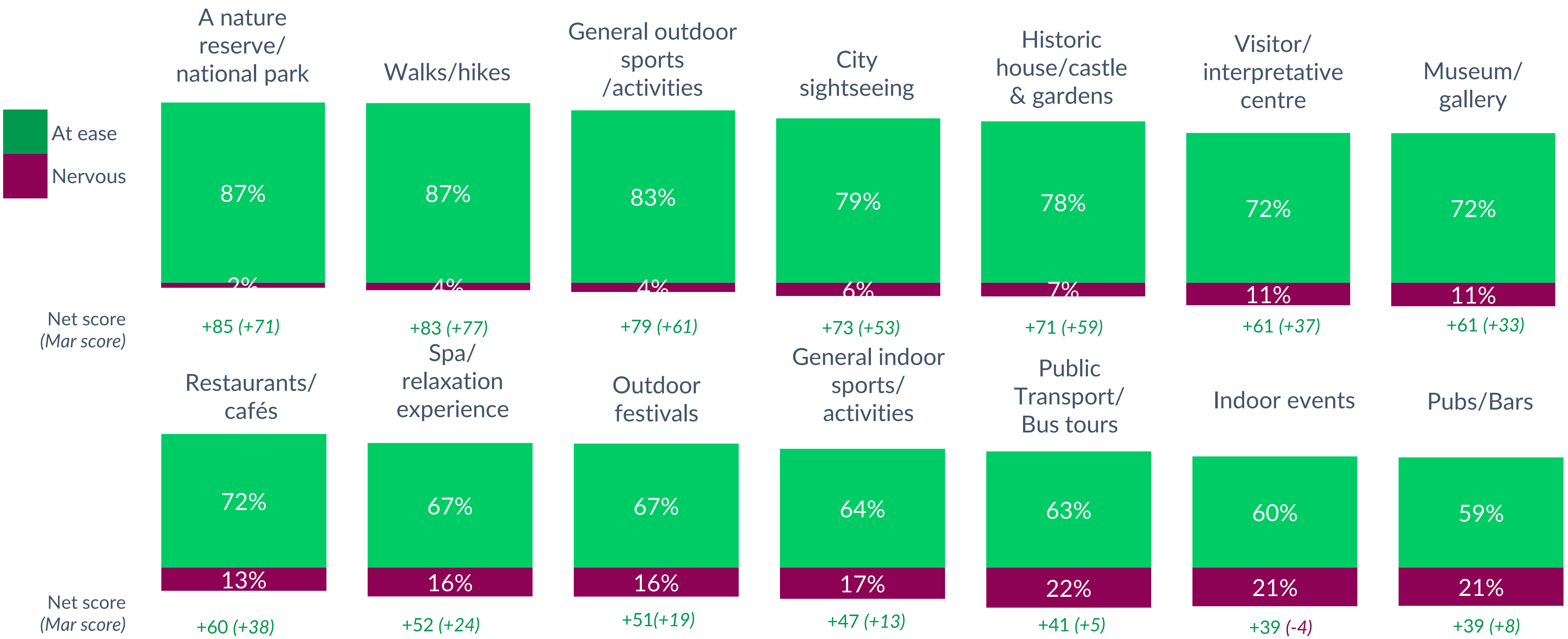


Base n = 411

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)?

Levels of comfort, in particular with indoor activities, grow significantly to large majority net scores

Ease in engaging with activities over the remainder of 2022

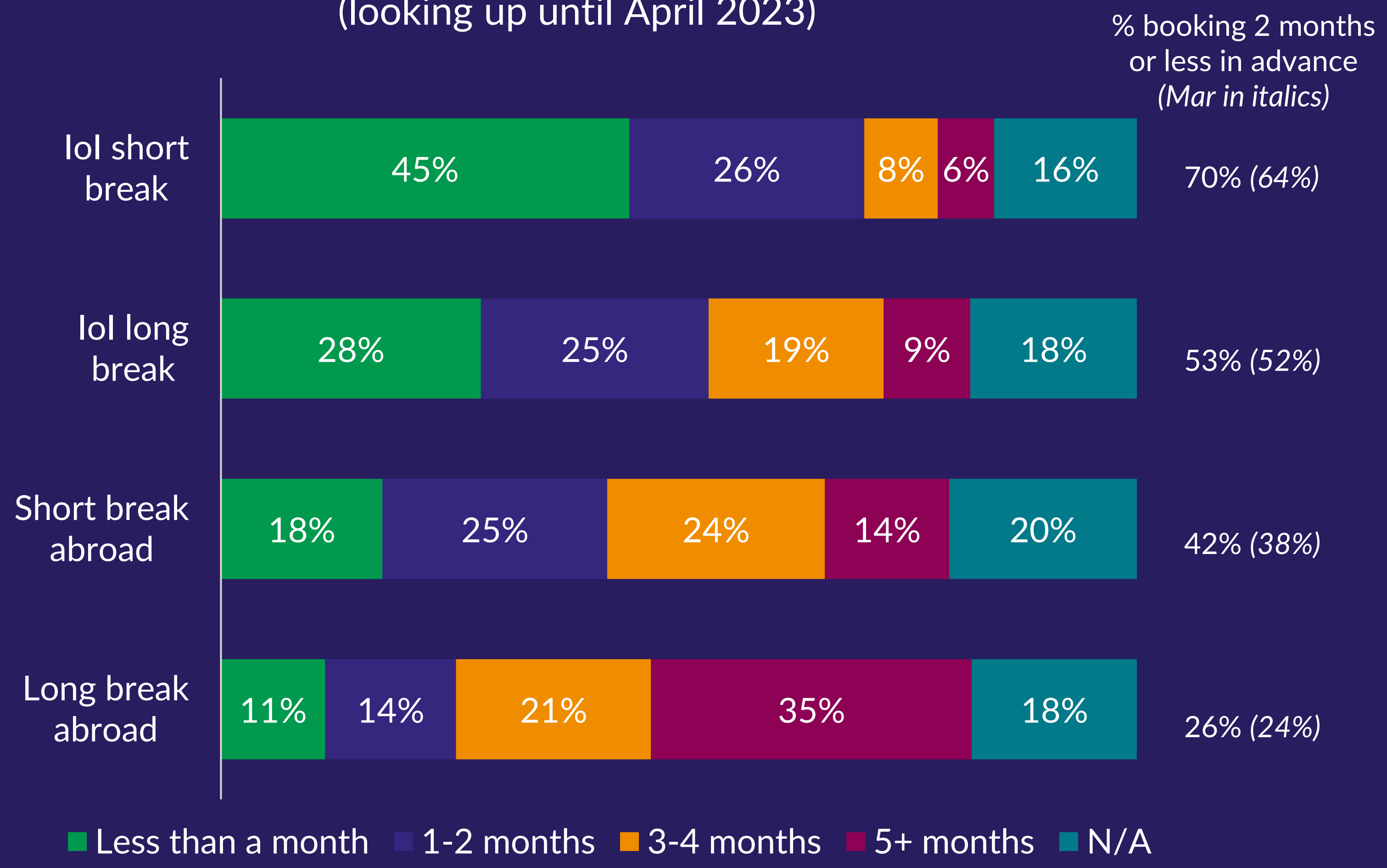


Base n = 411

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

Slight increases in number who'd book short breaks closer to the date of travel

How long they'd book holidays before date of travel
(looking up until April 2023)



Base n = 411

B6eNew. Thinking about booking holidays or short breaks, how far in advance would you book each of the following if you were booking a holiday for the remainder of the year and early 2023 (October 2022 – April 2023)?

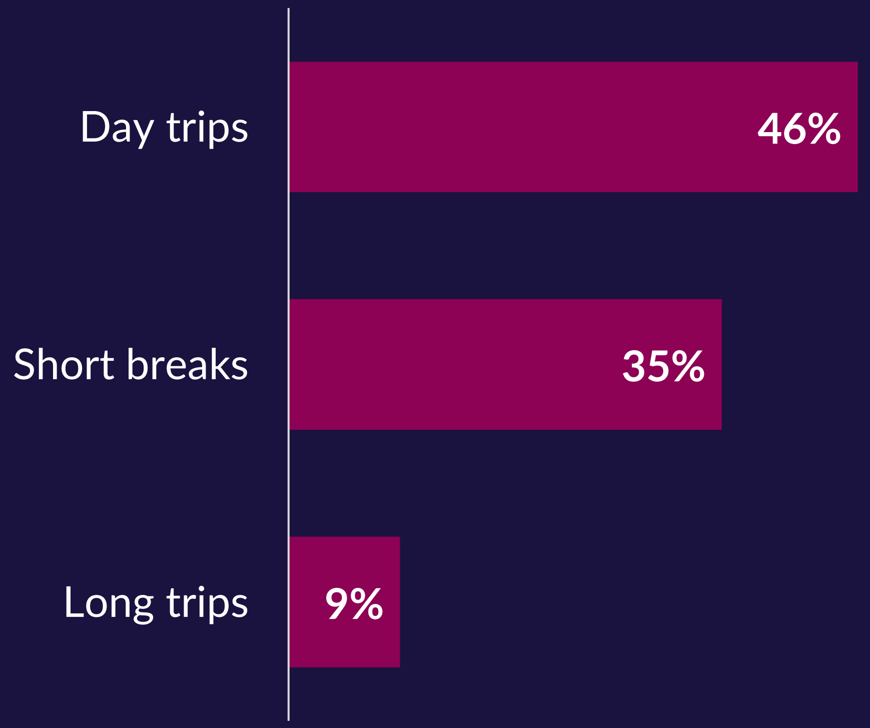
Travel Experiences

Nearly 2 in 5 have taken a short or long break in NI this year. Similar numbers took breaks in the Republic of Ireland while 1 in 3 didn't travel at all

37%

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

% of total sample who took…



Other than NI…

34% took a break in ROI

31% went abroad

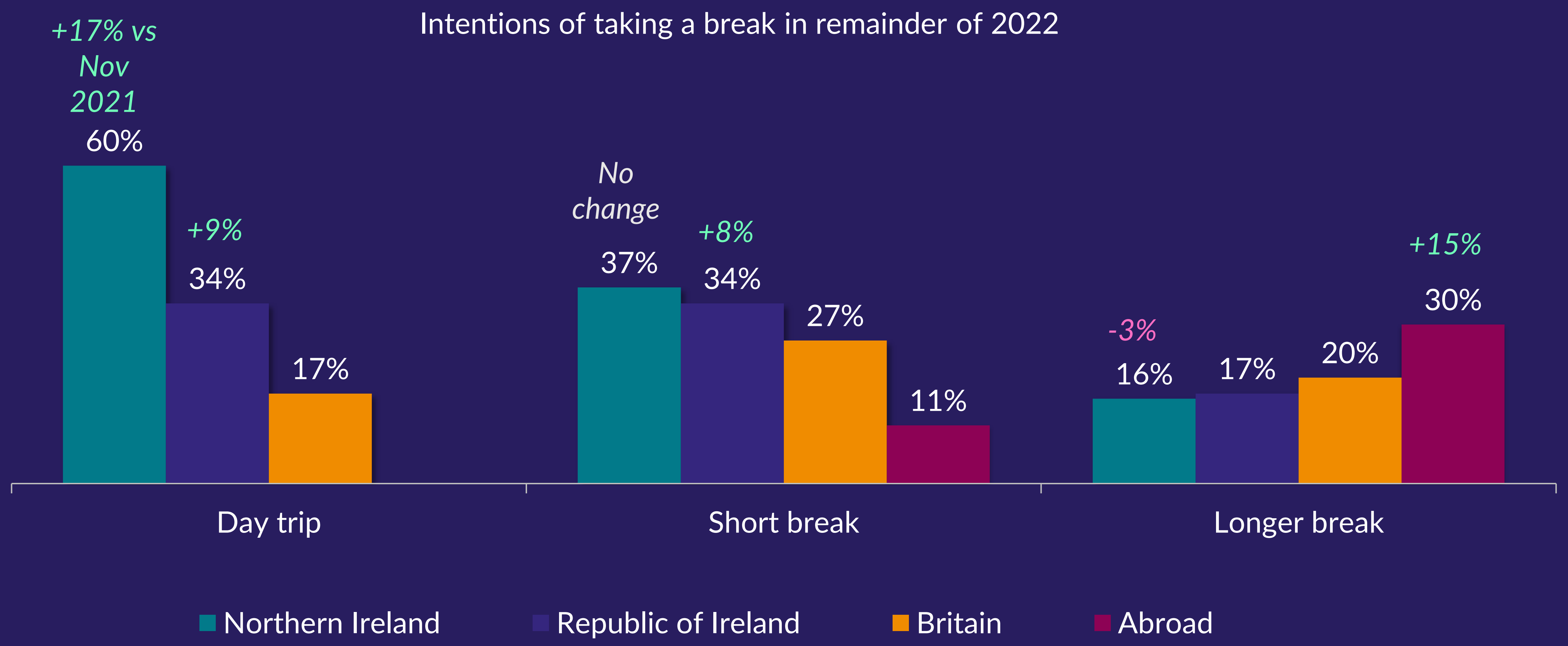
32% didn't travel at all

N = 411

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?

Travel Intent

Break intentions roughly the same as they were this time last year – but significant growth in number planning day trips in coming months



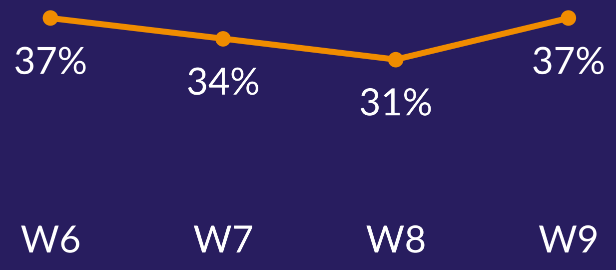
Base = 411

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 remainder of 2022 (September to December)?

Short break plans have a healthy level of consideration for late ’22 and will likely be spread across coming 3 months. Only 1 in 8 have booked however

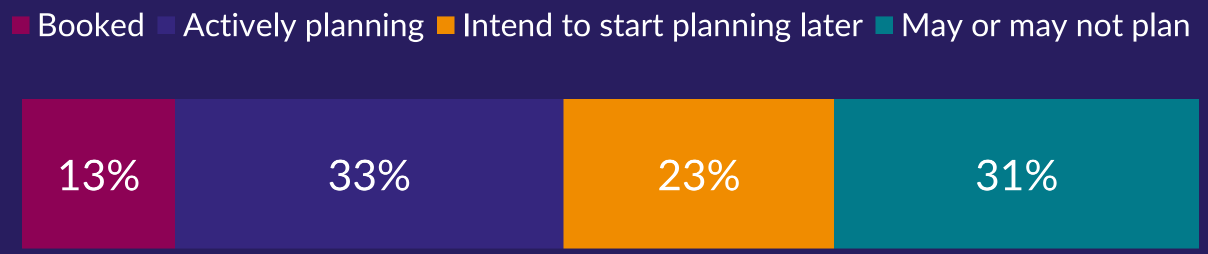
37%

are considering a **short break** in NI in late 2022



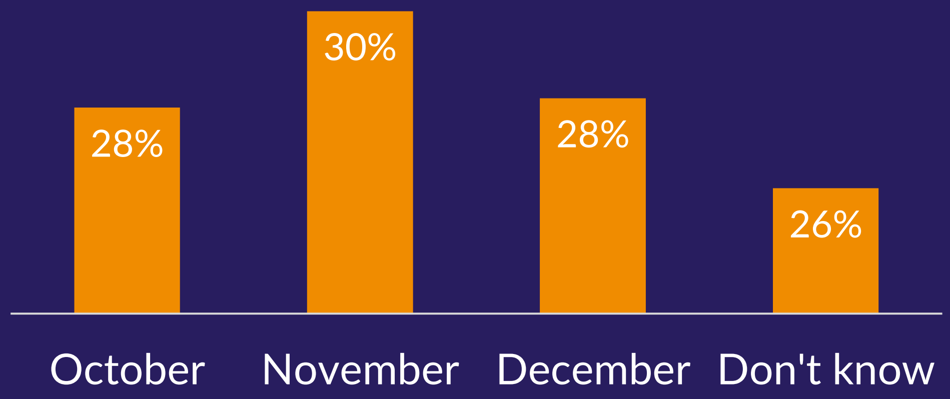
Base = 411 / 152 planning short break

Amount of short break planned



39% are actively planning or have booked a trip to NI – **17%** of the total sample

Short break planned for

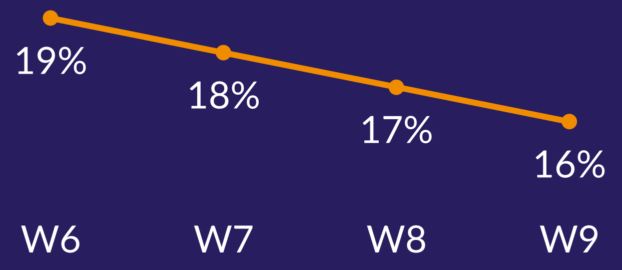


E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the remainder of 2022? / E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland/ E3. Have you booked or thought about planning this trip in Northern Ireland?

1 in 6 considering a long break in NI, with figures fairly stable over past year

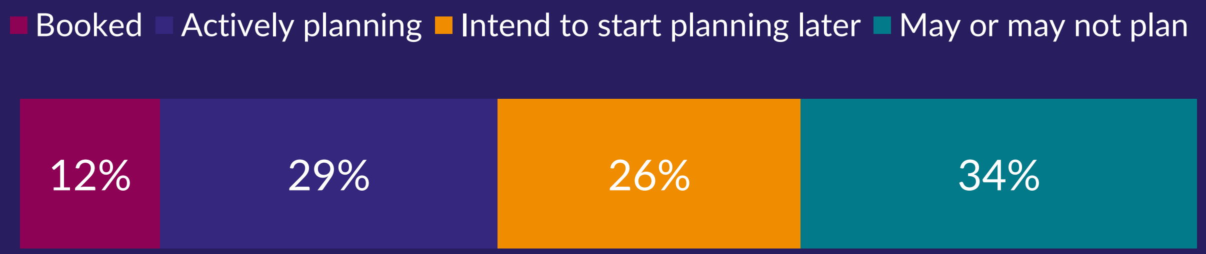
16%

are considering a **long break** in NI in late 2022



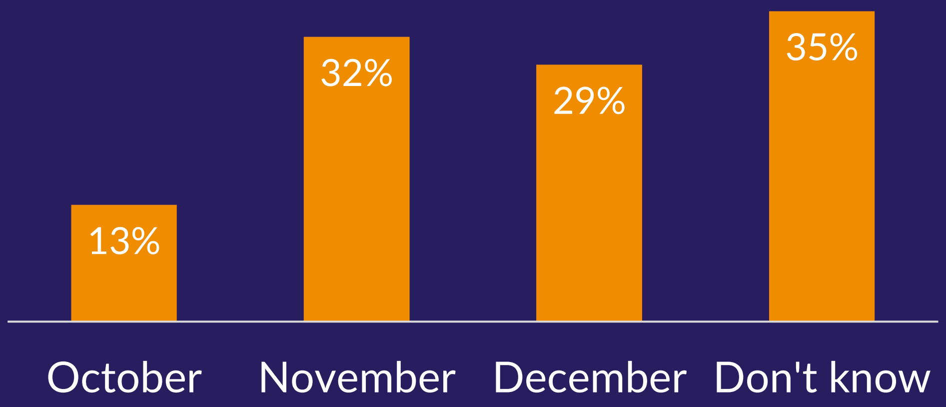
Base = 411 / 66 planning long break

Amount of long break planned



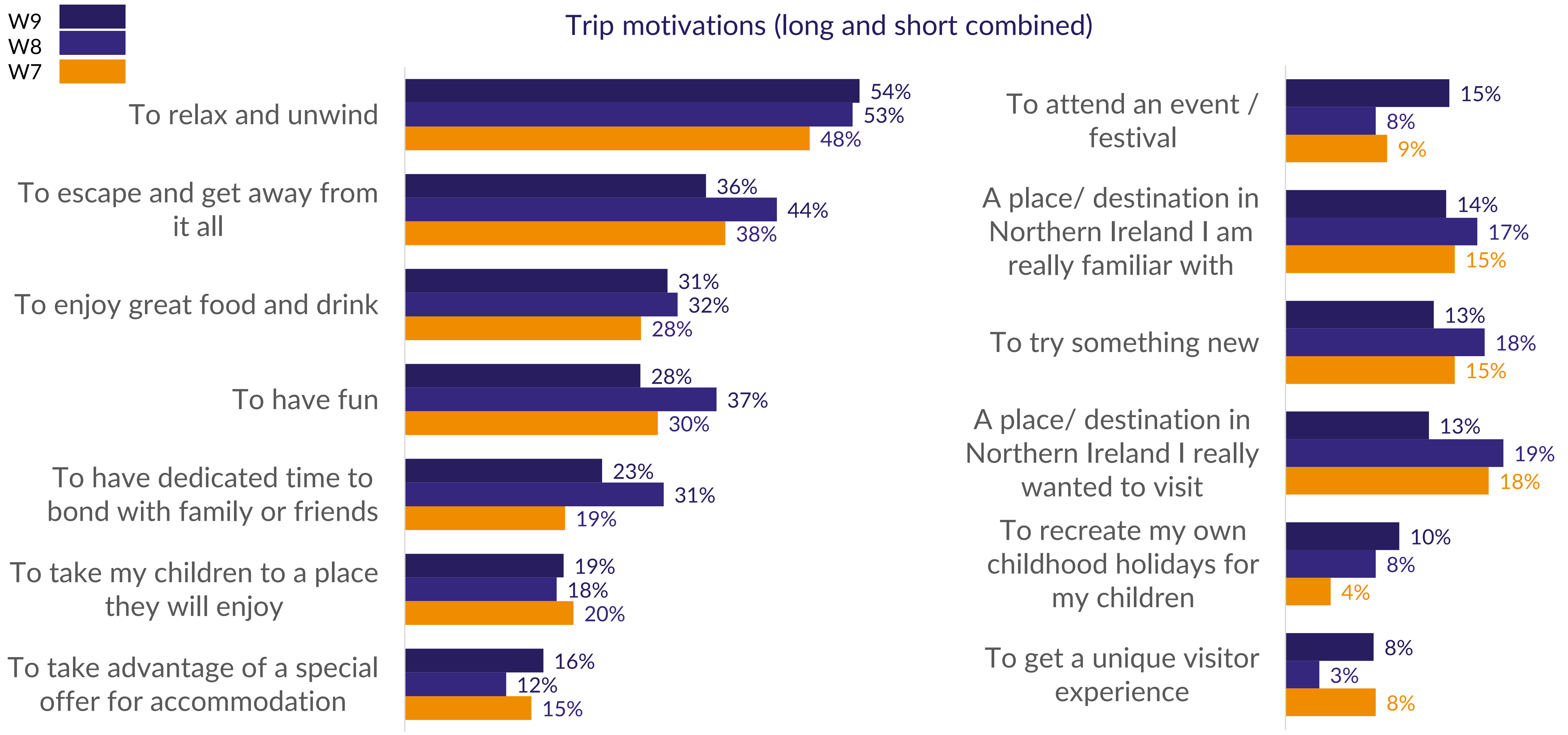
41% are actively planning or have booked a trip to NI – **7%** of the total sample

Long break planned for



E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the remainder of 2022? / 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 remains the key motivator for trips in Northern Ireland; escapism still a key theme but does drop compared with the last wave

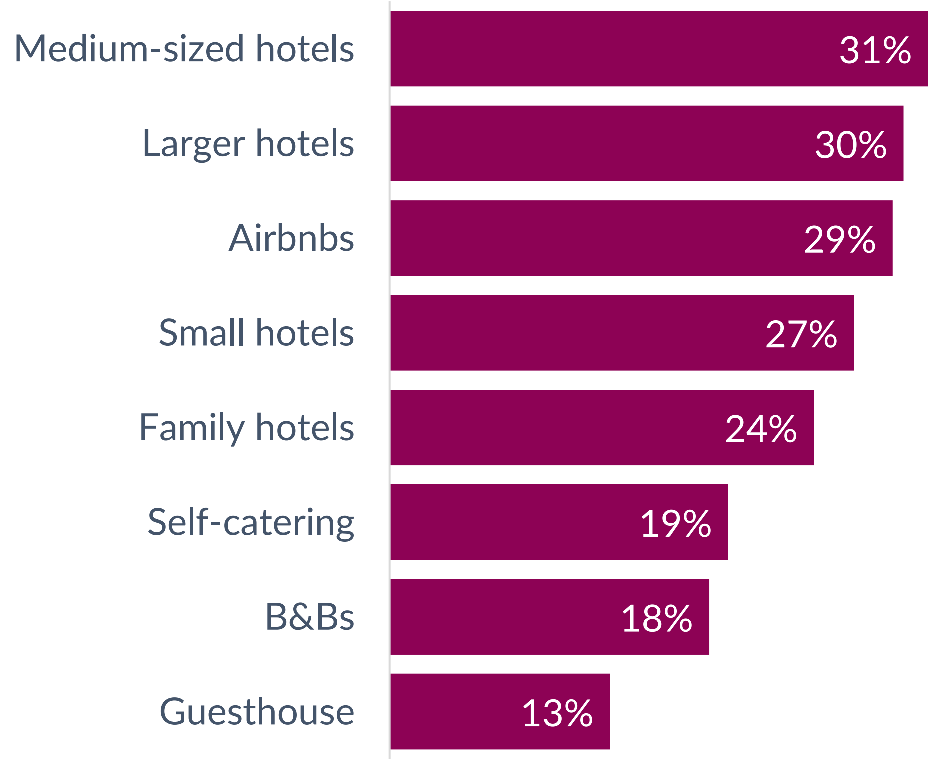


Base = 117

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

Trend towards larger hotels for trips in coming months. Most will be looking for 'laid back' holidays

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



Trend towards larger hotels (+20%) and Airbnb (+8%). Also trend towards laid back holidays (+6%)

Who travelling with (long & short combined)

- 55% Partner / spouse
- 39% Immediate family
- 22% Friends

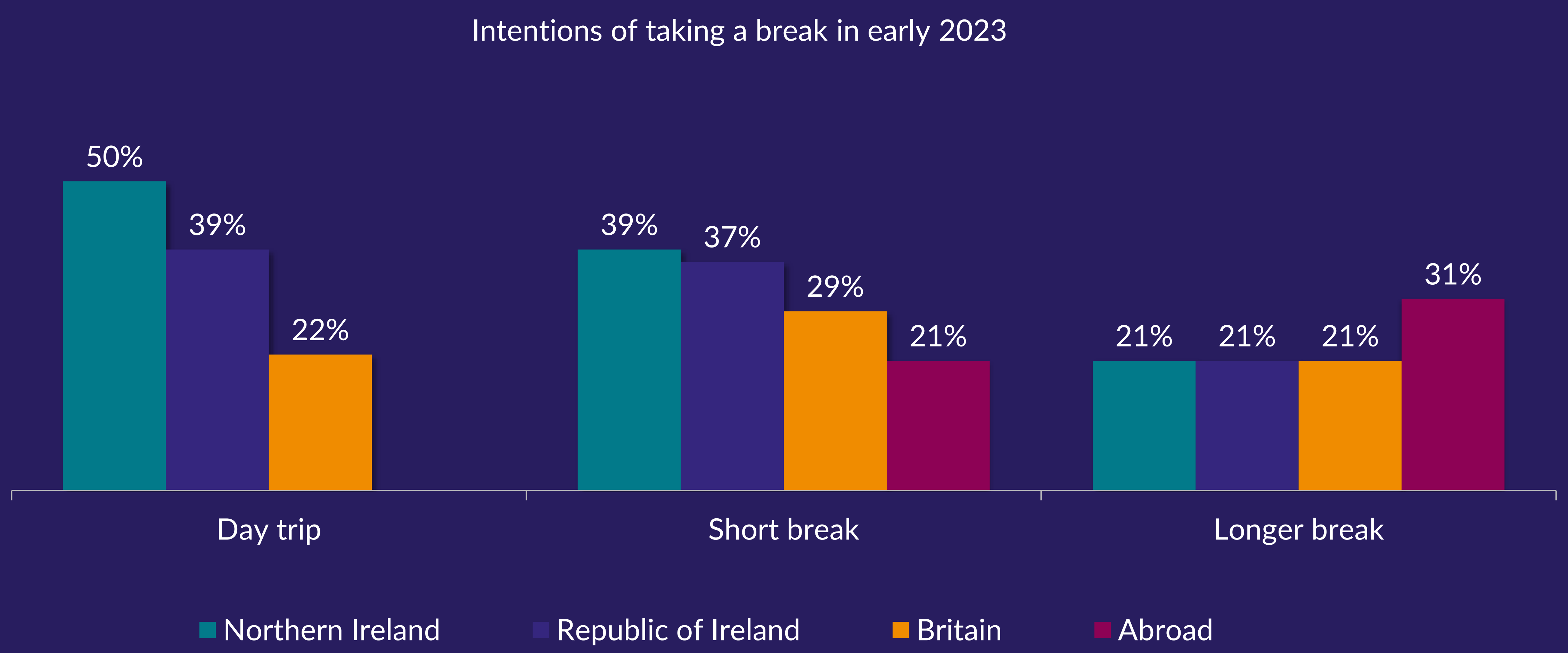
Type of trip preferred

- 62% Laid back holiday *+6% vs. Mar*
- 12% Exciting holiday *+2%*
- 26% A bit of both *-11%*

Base = 117

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? /E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer?

For **early 2023,** NI day trip volumes lower than late 2022, but increased volumes for short / long breaks



Base = 411

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 early 2023 (January – April?)

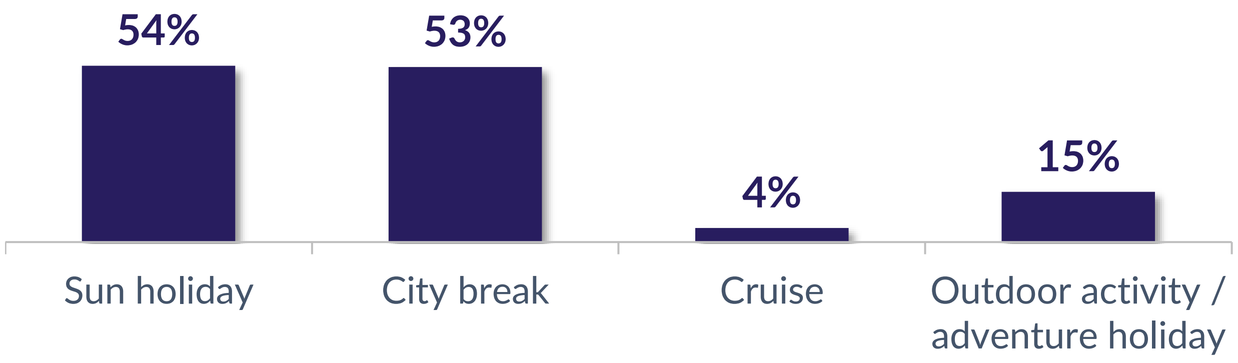
Weather still main reason for considering trips abroad, with value for money also a key consideration. City break intentions also up significantly

44% of total sample are considering a break abroad in late 2022 / early 2023

56% of this cohort are actively planning or have booked their trips

Trips are primarily planned for March (26%) and April (39%). City break intentions up significantly

What type of trip are you considering?

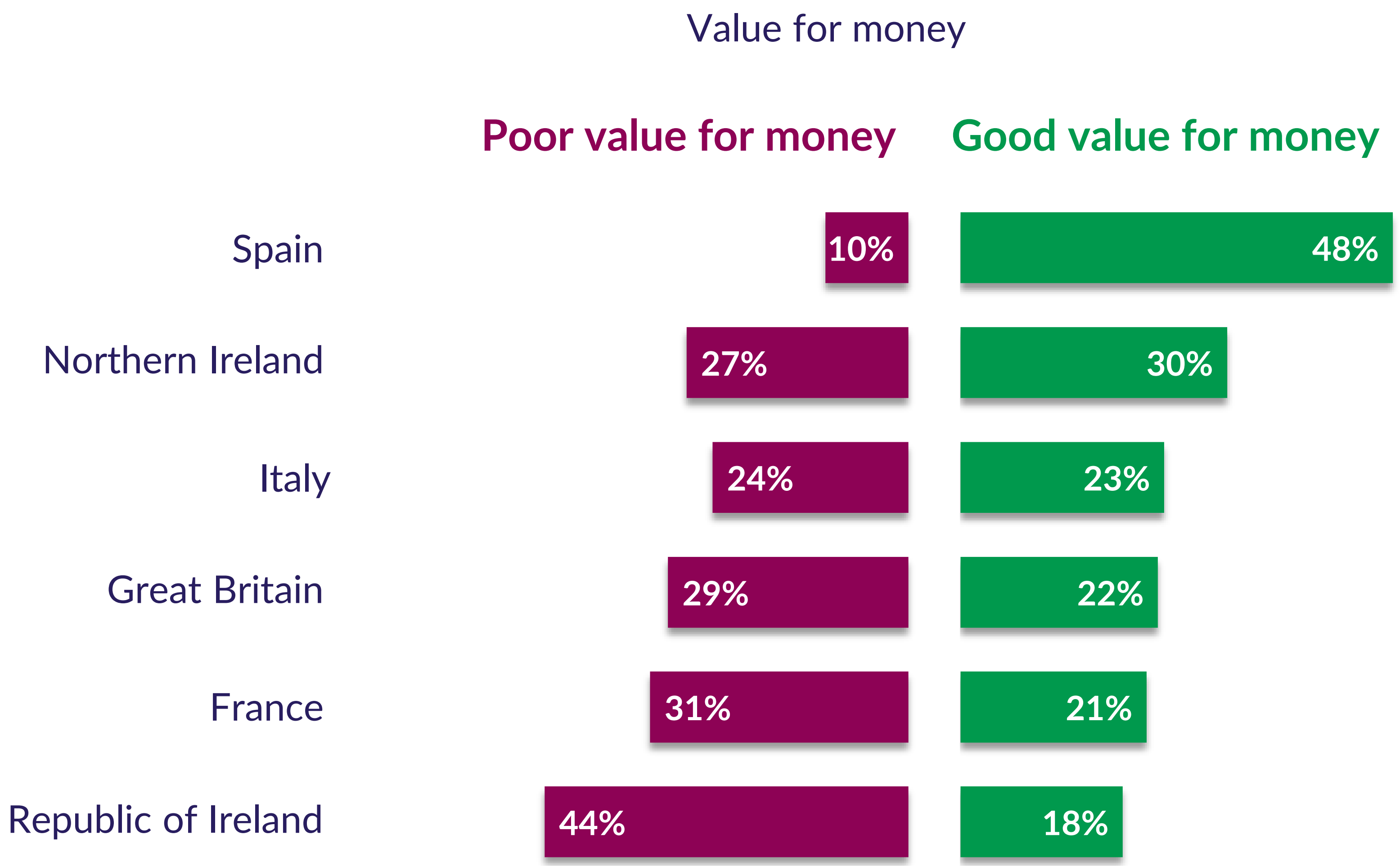


Base = 390 considering trip abroad

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

Value for money / Cost of living

Value for money perceptions down for NI among NI residents – but still well ahead of GB and ROI



Net Score

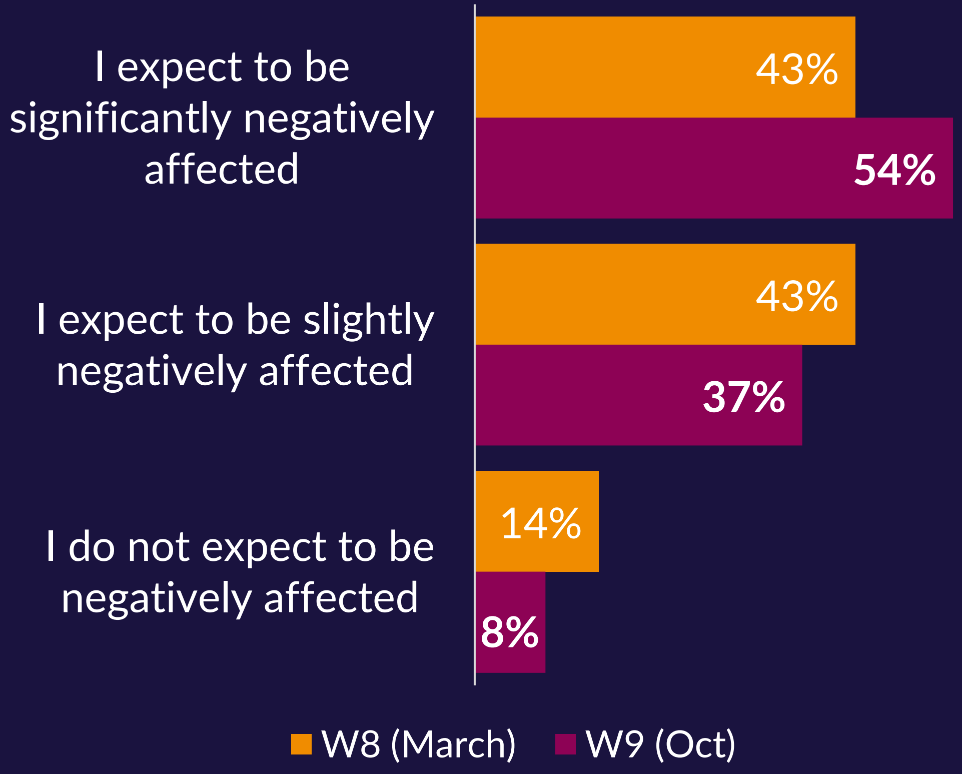
	Sep	Mar	Feb
Spain	+38	+36	+38
Northern Ireland	+3	+16	+19
Italy	-1	-1	+6
Great Britain	-7	-1	-6
France	-10	-14	+6
Republic of Ireland	-26	-19	-5

N = 411

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

Increase in number expecting to be **significantly affected by cost of living** – families in particular concerned

Extent to which they expect to be affected by cost of living



More likely to be **significantly affected**:
- Mid family 62%
- Aspiring Families 60%
- Social Instagrammers 59%

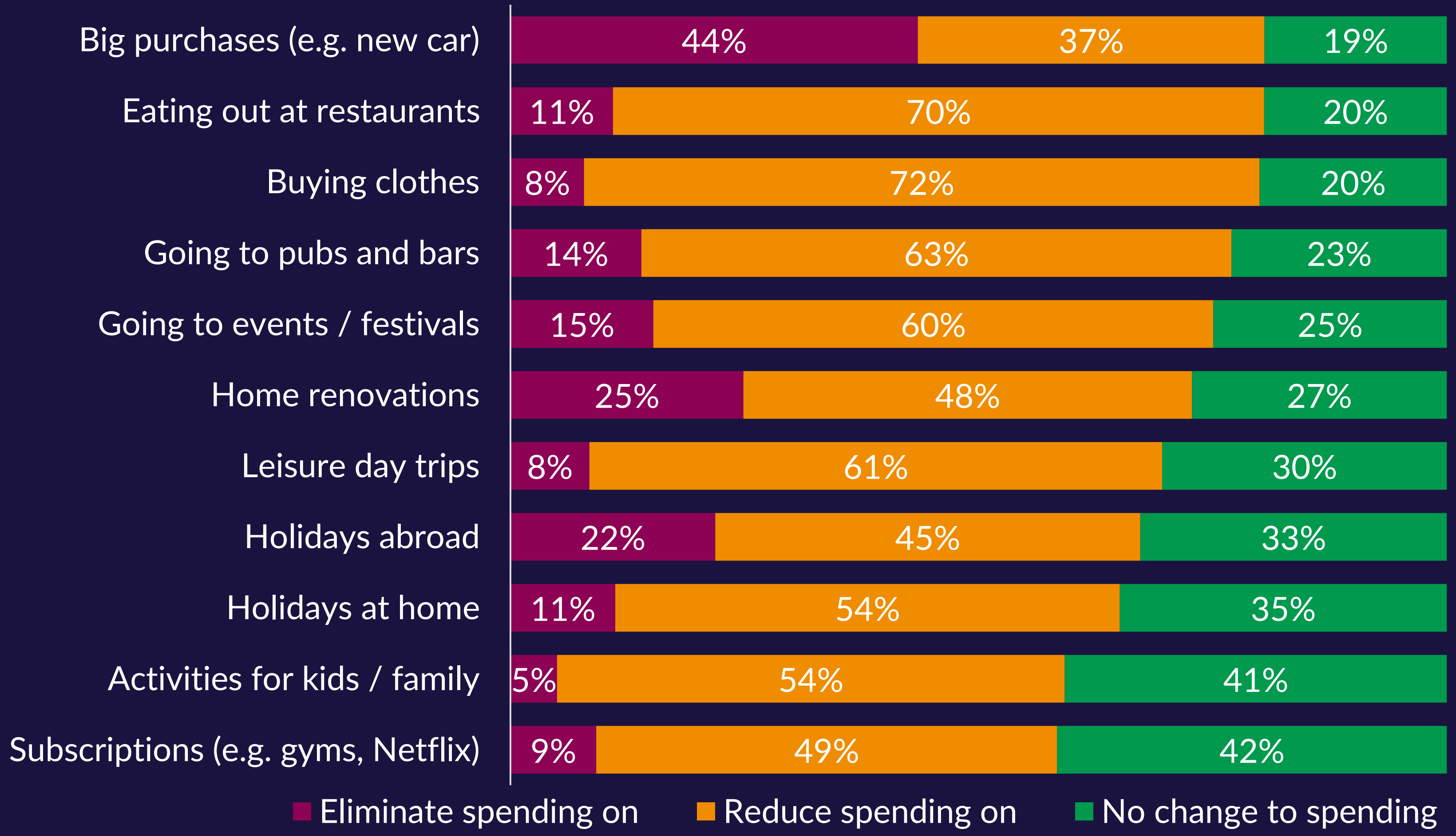
Less likely to be **significantly affected**:
- Empty nesters 48%
- Quality Seekers 44%

Base n = 411

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

Holidays and activities are some of the areas that consumers are **least likely** to consider reducing spending on

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



Base n = 411 (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…

Spend on paid activities and eating out will be reduced when it comes to day trips – **3 in 5 will look for more free activities**

How cost of living will affect day trip planning

Those who'll reduce day trips or travel closer to home – Top 3 reasons

1. Cost of fuel
2. Prioritising saving money
3. Cost of food & drink

Base n = 411 / 216

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?

Market comparison – Cost of living

People across demographic cohorts in both markets expect to be hit

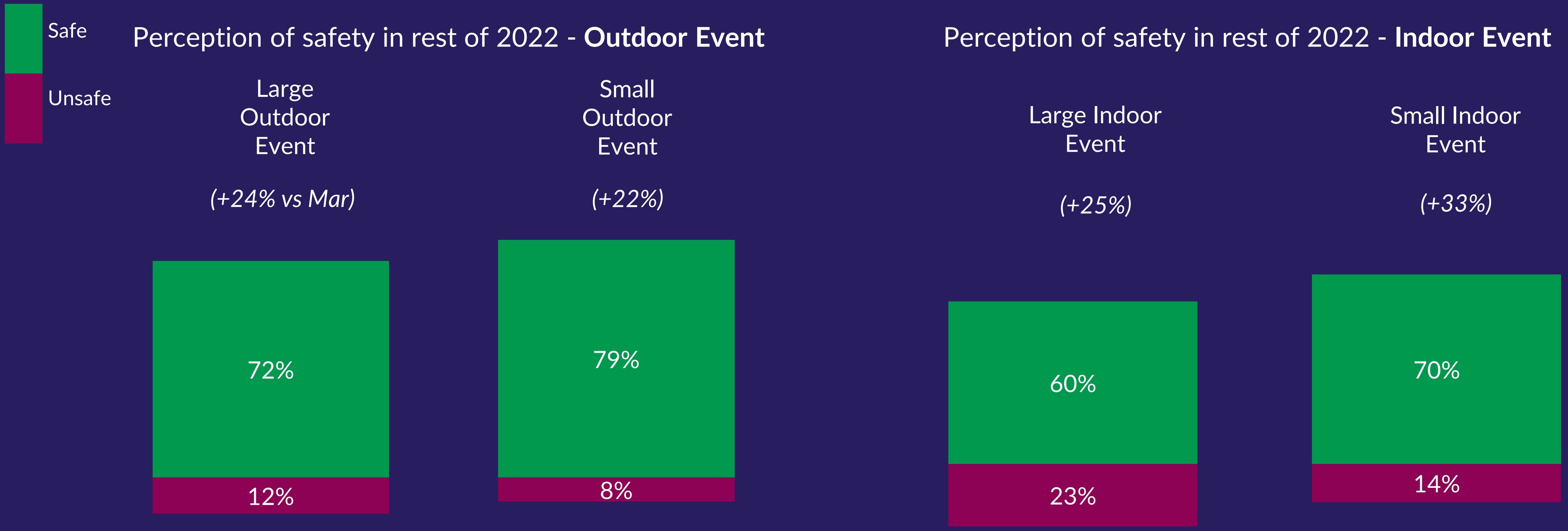
- 50% expect to be significantly affected by cost of living in ROI; 54% in NI.
- Both markets likely to reduce spend on big purchases and home renovations and look for more free things to do on day trips.

NI a bit more negative around things to do

- Those in NI were slightly more likely to say they will reduce or eliminate spend on family activities and eating out.

Events

High levels of safety perceived when it comes to events now, including large indoor events



Base n = 411

G1. How safe would you feel attending the following live event types in the remainder of 2022?