

Consumer Sentiment

NI Market

September 2020



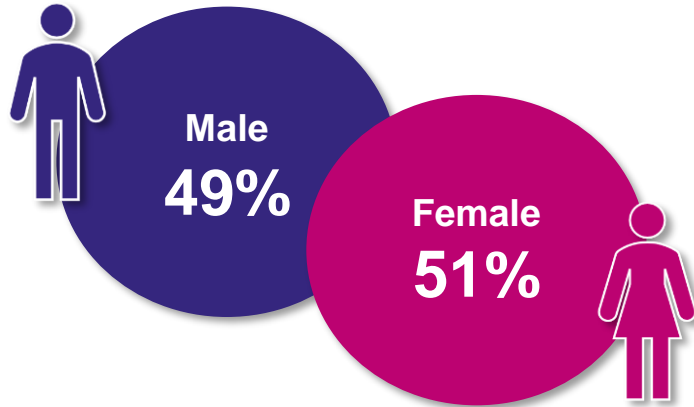
tourism
northernireland



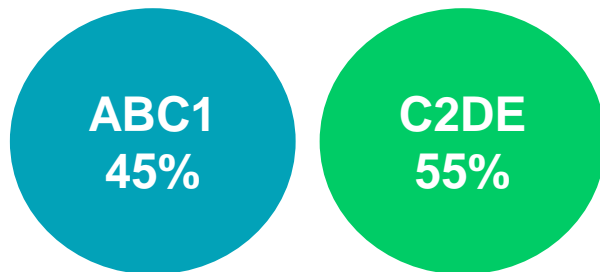
SPARK
The Strategic Insight Agency

A robust, nationally representative sample of 500 in Northern Ireland

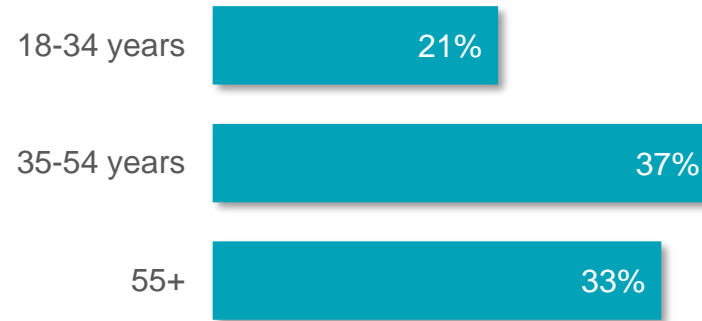
GENDER



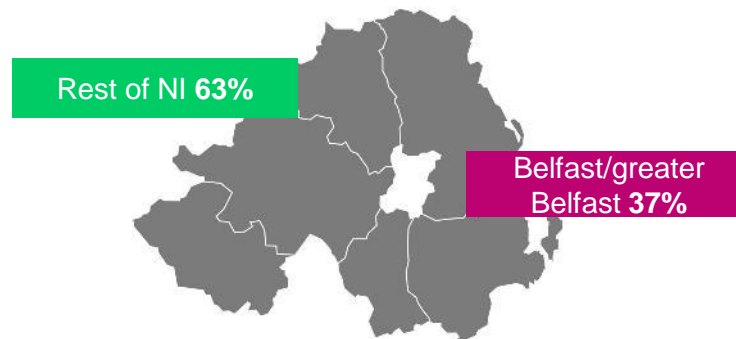
SOCIAL GRADE



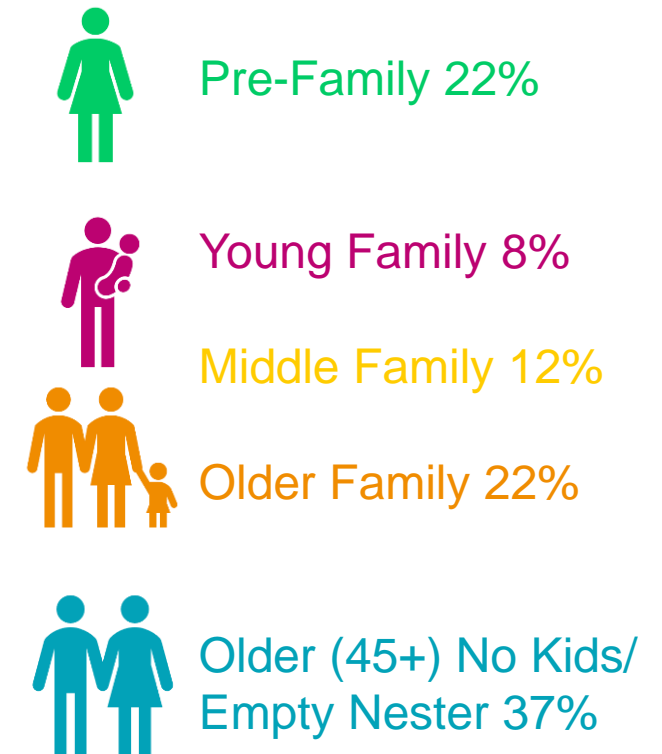
AGE



REGION



LIFESTAGE



Key Findings

Pessimism amplified in NI, with fears of contracting the virus widespread

Uneasiness with indoor activities is high

Safety messages need to be targeted at locals as well as holidaymakers

Safety and security is top of mind when considering holidaying in NI - Encouragingly, the **'We're Good to Go'** mark reassuring for majority

While many are taking leisure trips in NI - **room to encourage more overnight stays** and for holidaymakers to choose NI over ROI

People are looking at staycations as a way of unwinding - **Healthy NPS amongst the NI market**, but concern over the low score amongst younger cohorts

Covid-19 and Tourism



Pessimistic outlook is relatively high in NI

Younger families and C2DEs particularly negative

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

The worst is still to come

56%

More negative outlooks among **C2DEs** (63%), those with **Young / Mid Families** (63%), and those in **Armagh**(70%)



Will stay the same

30%

The worst has passed

14%

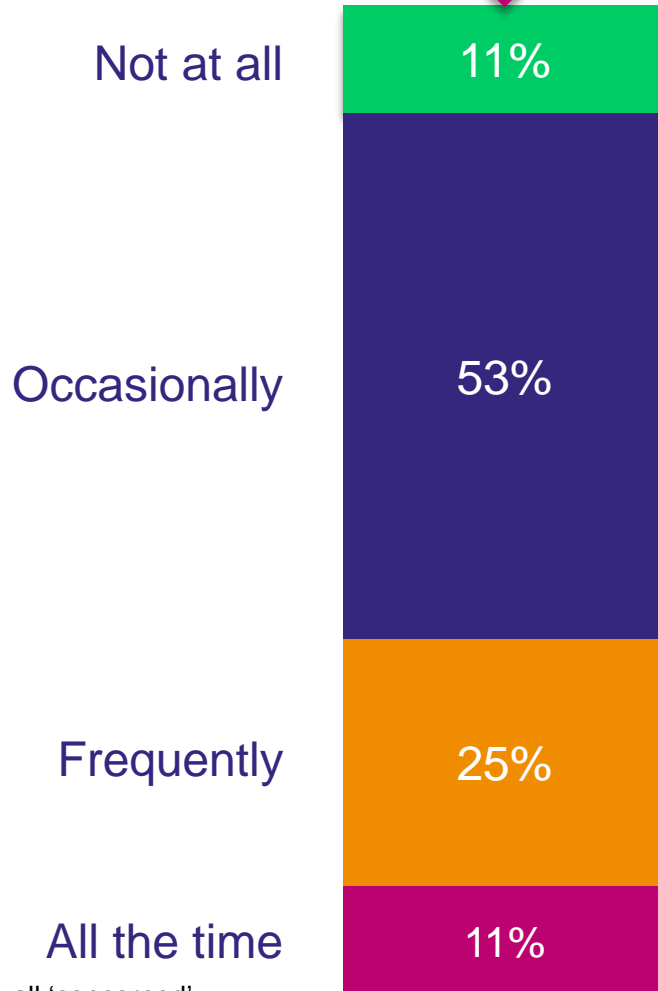


More positive outlooks among **those over 55** (19%), those in **Down** (22%)

Anxiety driven by fear of contracting virus

Consumers need reassurance that it is safe to holiday in NI

How often have you felt anxious / concerned during Covid?



Main causes for concern



72% Me / family and friends getting Covid-19



65% Concerned about a second wave



54% Uncertain about the future



51% The country's economy



37% Worried about money

Older generations more worried about contracting the virus, future uncertainty & money worries more prevalent with C2DEs



Me / family & friends getting Covid-19 **72%**

Highest Amongst

45+ year olds **77%**



Concerned about a second wave **65%**

Highest Amongst

45+ year olds **71%**



Uncertain about the future **54%**

Highest Amongst

C2DEs **59%**



Uncertain about the economy **51%**

Highest Amongst

Males **61%**
55 – 64 year olds **67%**



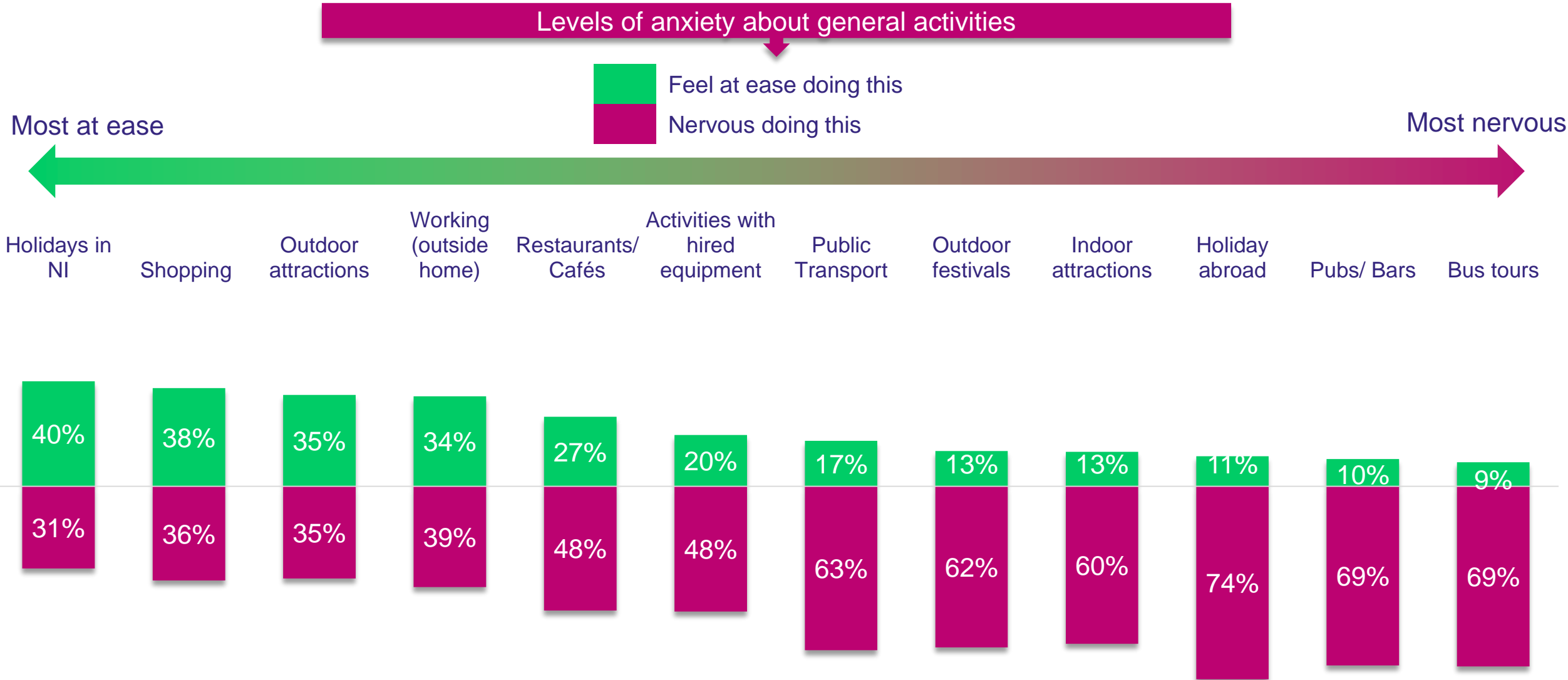
Worried about money **37%**

Highest Amongst

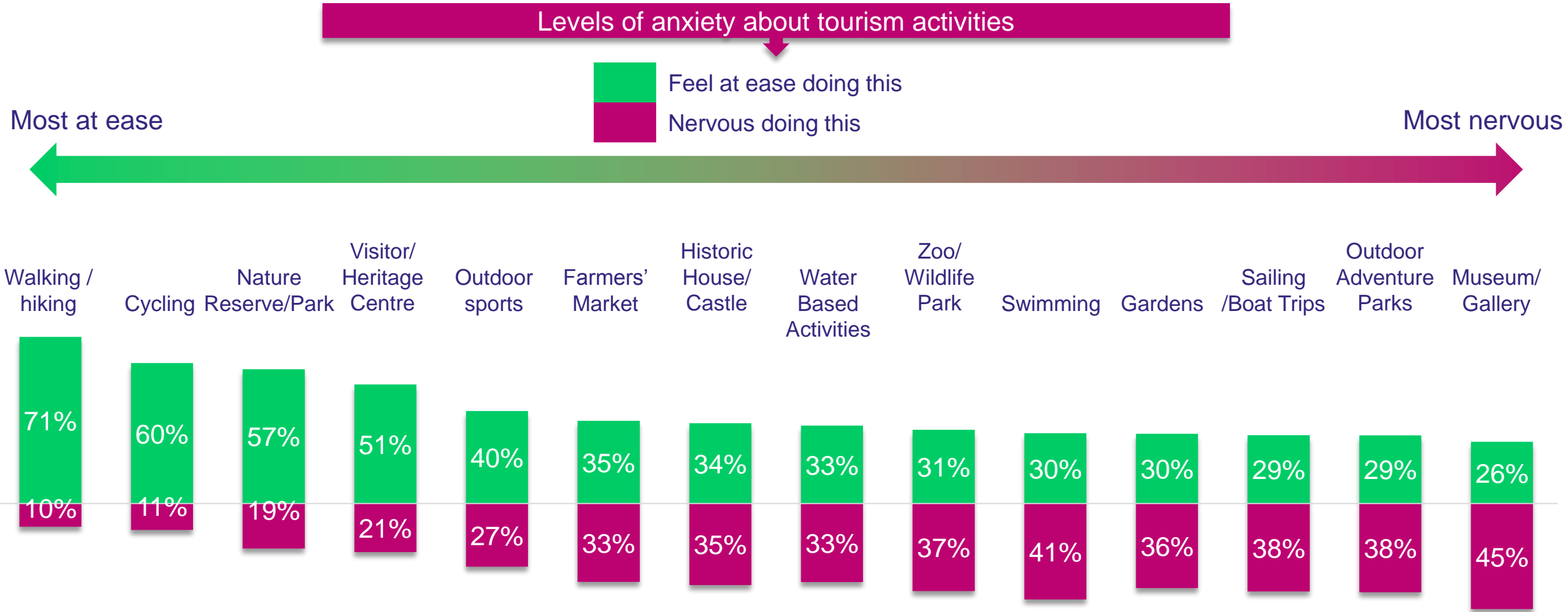
Pre Families **48%**
C2DE **43%**
Living in Armagh **45%**

Strong levels of anxiety towards high density and indoor activities

Important to promote outdoor activities at this time



People more comfortable with outdoor activities - Will take time before at ease with indoor/potentially crowded activities



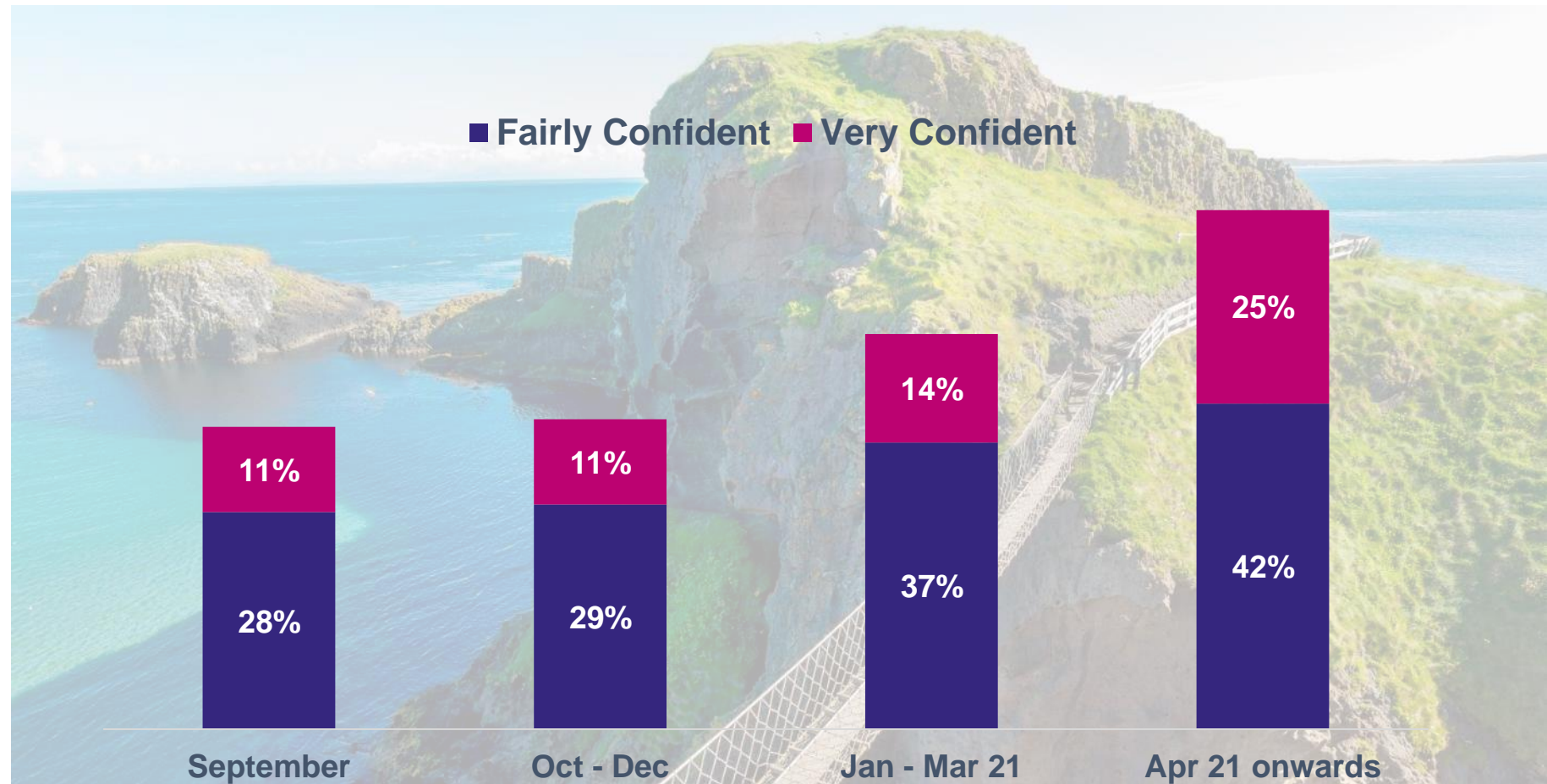
Confidence levels are low in NI

People need convincing to travel earlier

Only
39%

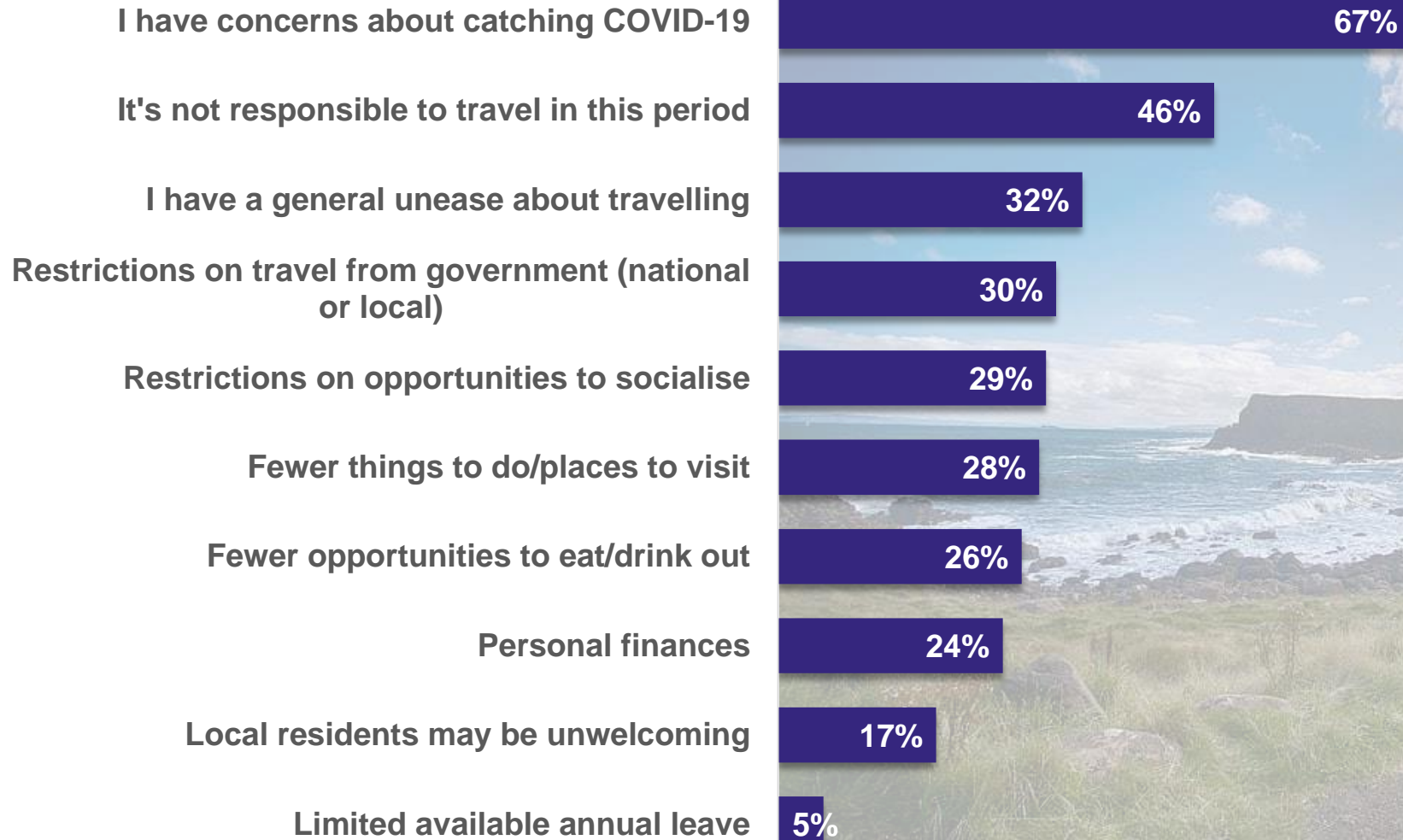
Confident in being able to holiday on the Island in September

Notably high amongst older families (**48%**) and ABC1s (**45%**)



2 in 3 consider the possibility of catching Covid-19 a the key barrier, **safety reassurance vitally important**

Why would you feel uncomfortable taking a break in NI in September?



N = 305, all not confident about travelling in NI

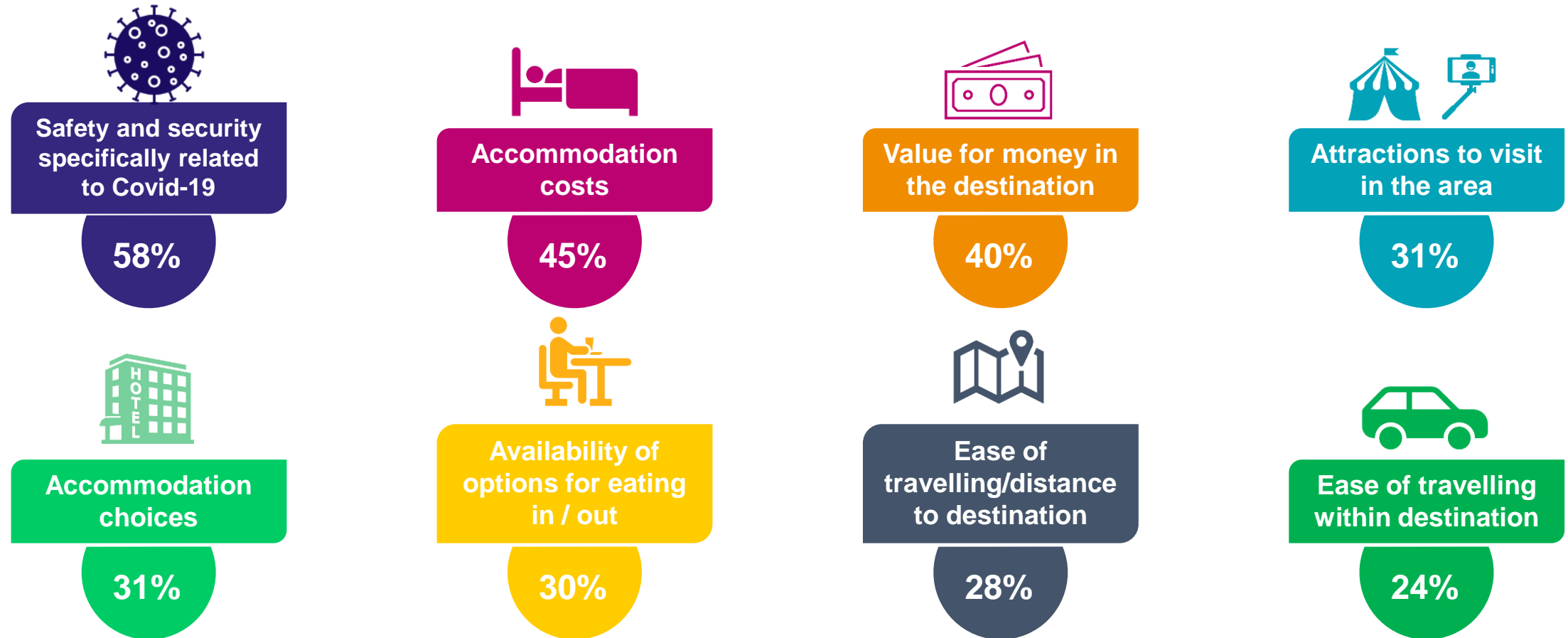
Q6 Which of the following contribute to you being 'not very confident' or 'not at all confident' about taking a Northern Ireland short break or holiday in September?

Drivers & Perceptions of a Domestic Holiday



Safety and security has become the key consideration

Short Break in Northern Ireland – Key Considerations



Base n = 500

Q9. If you were to consider booking a trip in Northern Ireland, which of these factors will be most important in your decision on where to go and stay?

Strong foundation awareness of Safety Mark Encouragingly, the mark evokes confidence for majority

30% aware of the mark



Confidence the mark gives you that a business is safe

N = 150

9%

It gives me a lot of confidence

30%

Its gives me confidence

44%

It gives me a little confidence

17%

It gives me no confidence

83% offering at least a little confidence

N = 500

Q10. Are you aware of the 'We're Good to Go' mark?/Q11. To what extent does the 'We're Good to Go' mark give you confidence that a tourism or hospitality business is safe to visit?

Outdoor activities preferred – older cohorts more interested in gardens & historic houses, zoos amongst young families

Top activities they would be interested in if holidaying in NI



Walking / hiking 59%

Nature reserve/ national park 50%

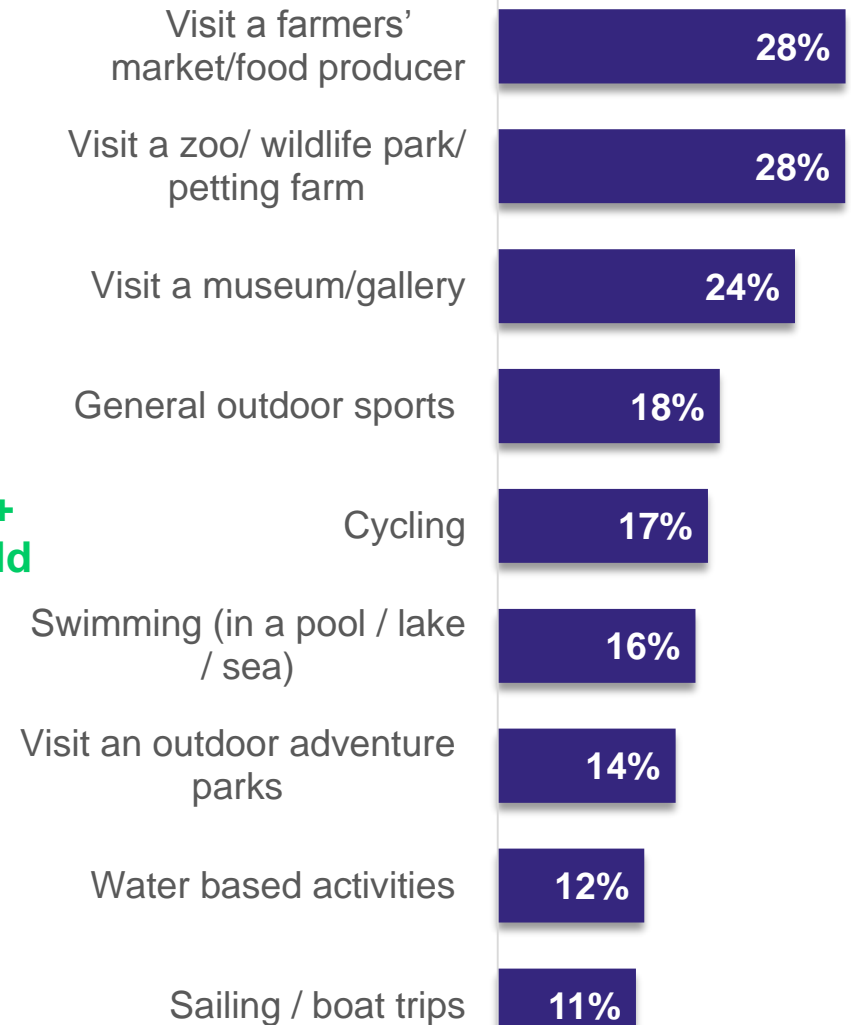
Gardens 50%

↑ **68% 65+ years old**

Historic house/castle 44%

↑ **66% 65+ years old**

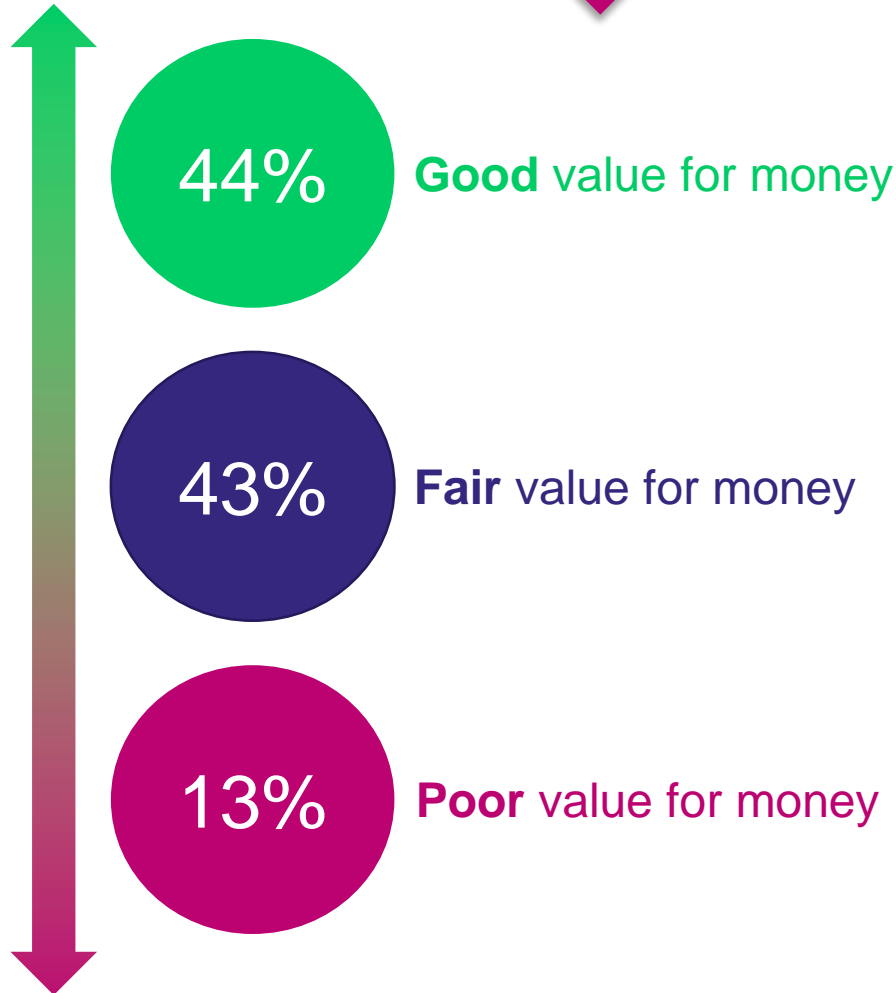
Visitor/ heritage centre 28%



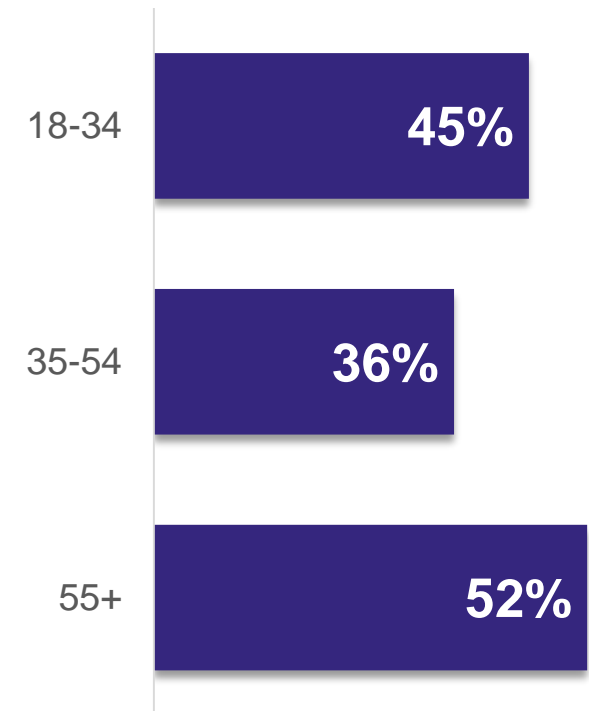
↑ **59% young families**

NI seen as good VFM, particularly amongst older cohorts

NI value for money as a tourist destination



% see NI as good value for money – X age group



Travel Intentions



3 in 10 have had their trip in NI impacted by Covid

Important to keep an eye on cancellations going forward

66%

have had plans to take a holiday either on the island of Ireland or abroad impacted by Covid-19

% of total sample who have had travel plans impacted...

In Northern Ireland

29%

↑ 37% Empty Nesters/Older no kids

In the Republic of Ireland

33%

Abroad

44%

Many taking leisure trips, while only some staying overnight – focus on encouraging overnight stays

Trips in Northern Ireland since July

44%

Have taken
some sort of
holiday in NI
since July

Short Trip (close to home
up to 12 miles/ 20 kms)

27%

Day Trip (more than 12
miles/ 20 kms from home)

24%

Short Break (1-3 nights)

12%

Long Break (4+ nights)

3%

More NI residents taking longer breaks in ROI than in NI

Competition for overnight trips a significant challenge

Trips in Republic of Ireland since July

Short Trip (close to home
up to 12 miles/ 20 kms)

4%

Day Trip (more than 12
miles/ 20 kms from home)

7%

Short Break (1-3 nights)

10%

Long Break (4+ nights)

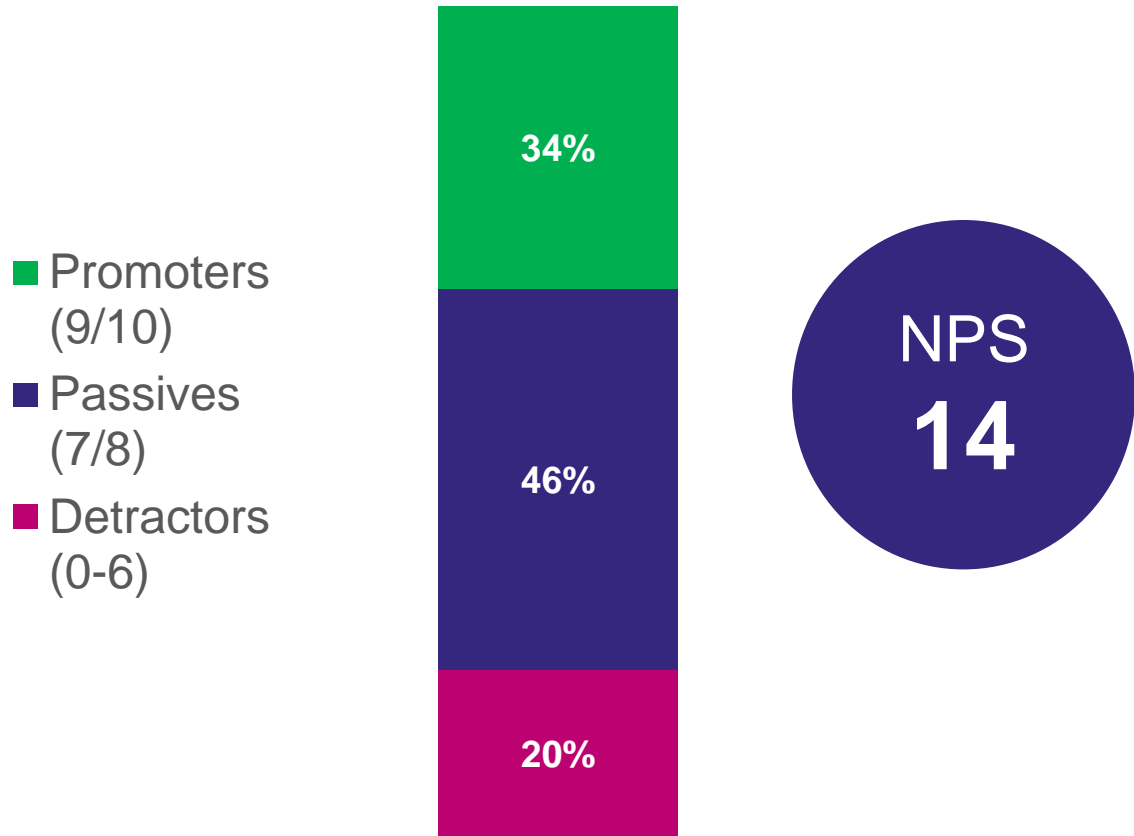
5%

22%

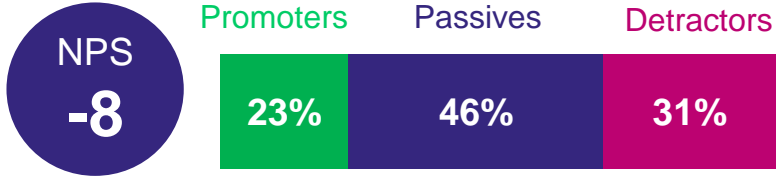
Have taken
some sort of
holiday in ROI
since July

Healthy NPS amongst those living in NI – younger cohorts and males less likely to recommend holidaying in NI

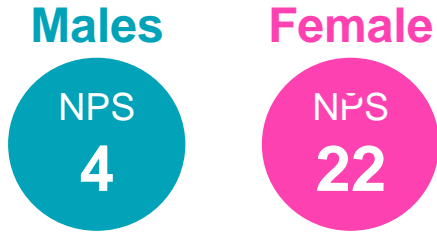
NPS – those who have travelled to NI since early July



Under 35s (n=75)



Gender



N = 218, all who have holidayed in NI

1 in 4 intending to take a short break in NI – Holidaymakers need reasons to book sooner rather than later



N =500

25% intend to take a short break in Northern Ireland

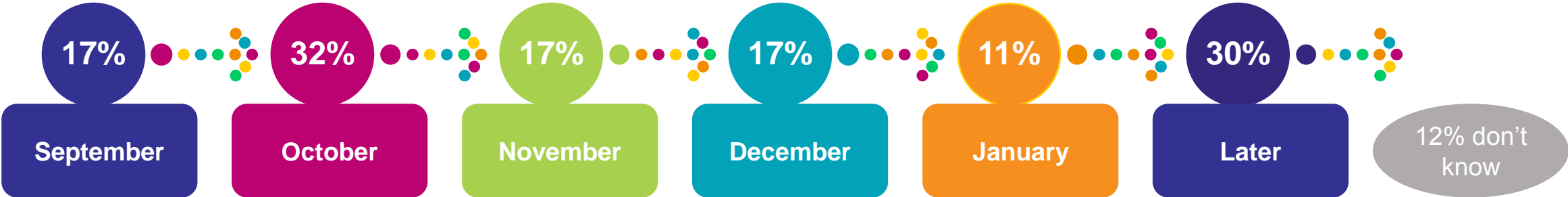
How much of your short trip have you planned

N =124



N =124

*Intention to take a short break to Northern Ireland in:



*Respondents could be intending on going on more than one trip

Longer stay holidaymakers similarly hesitant to make plans

Very few planning trips in the next few months

N = 500

12% intend to take a longer break to Northern Ireland

How much of your longer break have you planned?

N = 58

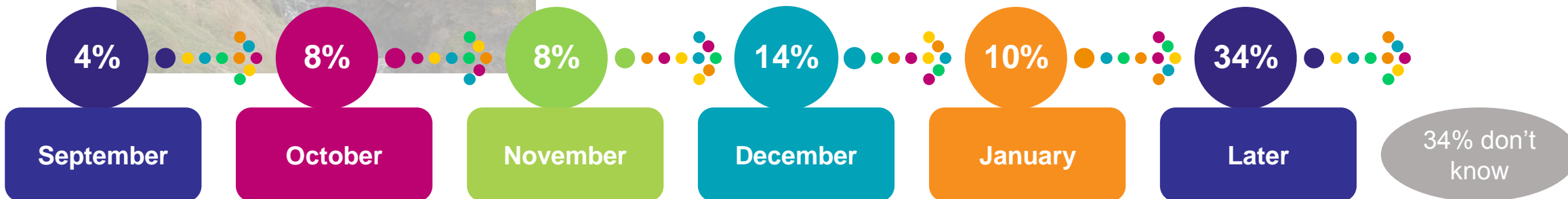
(caution low base size)

Booked all of it Booked some of it Booked none of it



N = 58
(caution low base size)

*Intention to take a longer break to Northern Ireland in:



*Respondents could be intending on going on more than one trip

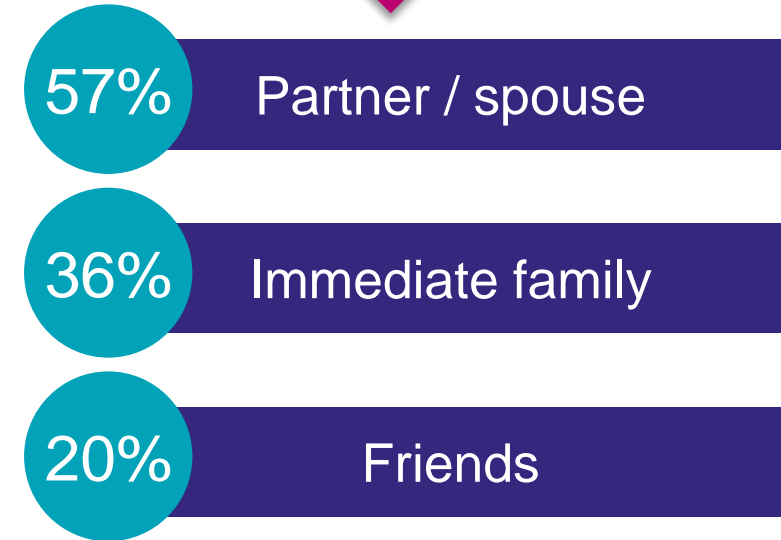
To Relax & Unwind the key reason for taking a trip in NI

Important to convey in advertising

Motivations for longer / short breaks (combined)



Who travelling with



N = All those who intend on taking a short or long trip – 133

On average, holidaymakers expect to spend £94 on Food & drink per night – younger cohorts and families bigger spenders

Average expect to spend on upcoming trip per night



	Avg. spend on Food & Drink	Avg. spend on activities
Under 45s (n=84)	£113	£101
Over 45s (n=70)	£74	£57
Those with children (n=85)	£126	£103
Those without children (n=71)	£69	£62
Long break (n=58)	£99	£88
Short break (n=124)	£95	£81

N = All those who intend on taking a short or long trip – 133

Q28. During your trip in Northern Ireland, how much would you be willing to spend on the following each night? (£)