Consumer Sentiment
NI Market
April 2022 Report

tourism northernireland

SPARK The Strategic Insight Agency

Research background

Research Background & Objectives

This is the **8th wave** of our consumer sentiment barometer for Northern Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how things are changing.

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?

Fieldwork conducted end of March

15th March

'Covid is definitely not over': Experts believe up to 150k people in Northern Ireland infected last week as chief scientific advisor warns public

30th March

Cost of living crisis the top concern among public in Northern Ireland

15th March

Northern Ireland set for 'summer of discontent' as living costs surge

We interviewed a robust, nationally representative sample in Northern Ireland

Total sample = 400

Gender

48% **Male**

52% **Female**

Social Grade

ABC1: 45%

C2DE: 55%

Age

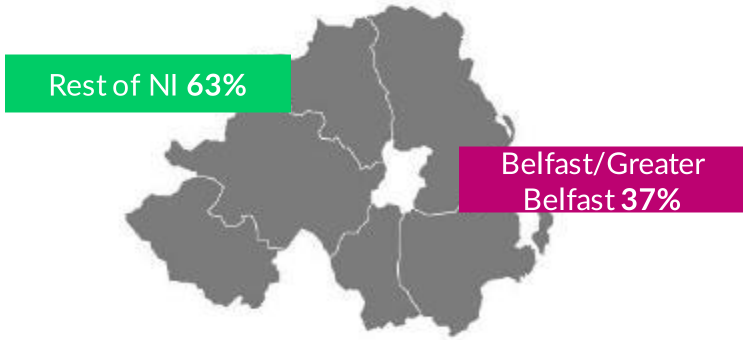
18-34	30%
35-54	37%
55+	33%

Lifestage

Pre-family	22%
Young family	12%
Mid family	11%
Older family	21%
Empty nesters	18%
Older, no kids	16%

Base n = 400

Region



Key Takeaways

NI now in line with the Republic of Ireland when it comes to Covid confidence

- Number saying 'the worst is still to come' **stable at 15%** in NI while it grows in ROI to 21%
- Ease with indoor activities and confidence that a trip would not be cancelled also grow to match ROI figures
- Both markets now **in a good place** with mindsets not significantly affected by spike in cases – can now start to look to the future.

NI holding strong in terms of travel intent

- Most figures for spring and summer break intentions are in line with the scores from February – but more people are **actively planning or have booked trips**
- Increased numbers for day trips and short break intentions remain strong.

But competitors may start to get more of a foothold in coming months

- No significant differences for competitor travel intentions for next few months – but looking ahead to summer, travel abroad intentions **grow 10pps** to 31% for long breaks, and ROI short/day trips also increase.

Low perceived cost of staycations can be an asset in present environment

- **86%** expect to be negatively affected by **cost of living increases**, with 29% considering staycations rather than trips abroad as a consequence
- Unlike ROI, NI residents perceive Island of Ireland holidays as a cheap option.

Covid-19 and tourism

Little change in perceptions of Covid outlook – despite growing case numbers

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

More negative outlook among **older, no kids** (28%) and **over-65s** (23%)

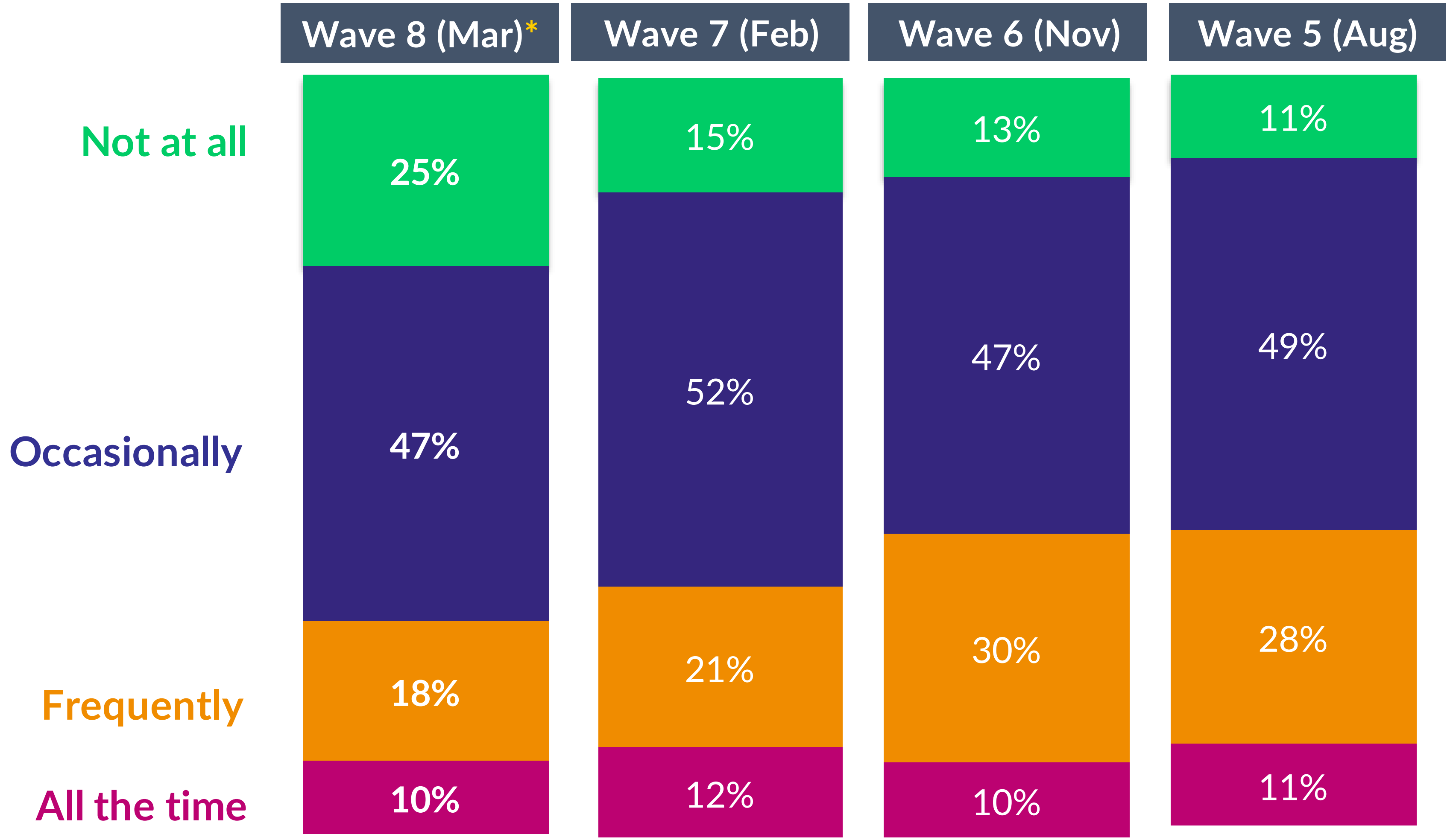
More positive outlook among **females** (52%) and **young family** (48%)

Base n = 400

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?

Anxiety **decreases** with 1 in 4 now saying they are not anxious at all due to Covid

Stress / anxiety levels due to Covid



- **Those in Greater Belfast** 35%
- **Pre-family** 34%
- **ABC1** 33%

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

Base n= 400

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

Market Comparison
Covid-19 & Tourism

Market anxiety levels have flipped again – now NI more optimistic about case numbers

38% in ROI think the 'worst has passed' – in NI, this figure is **46%**

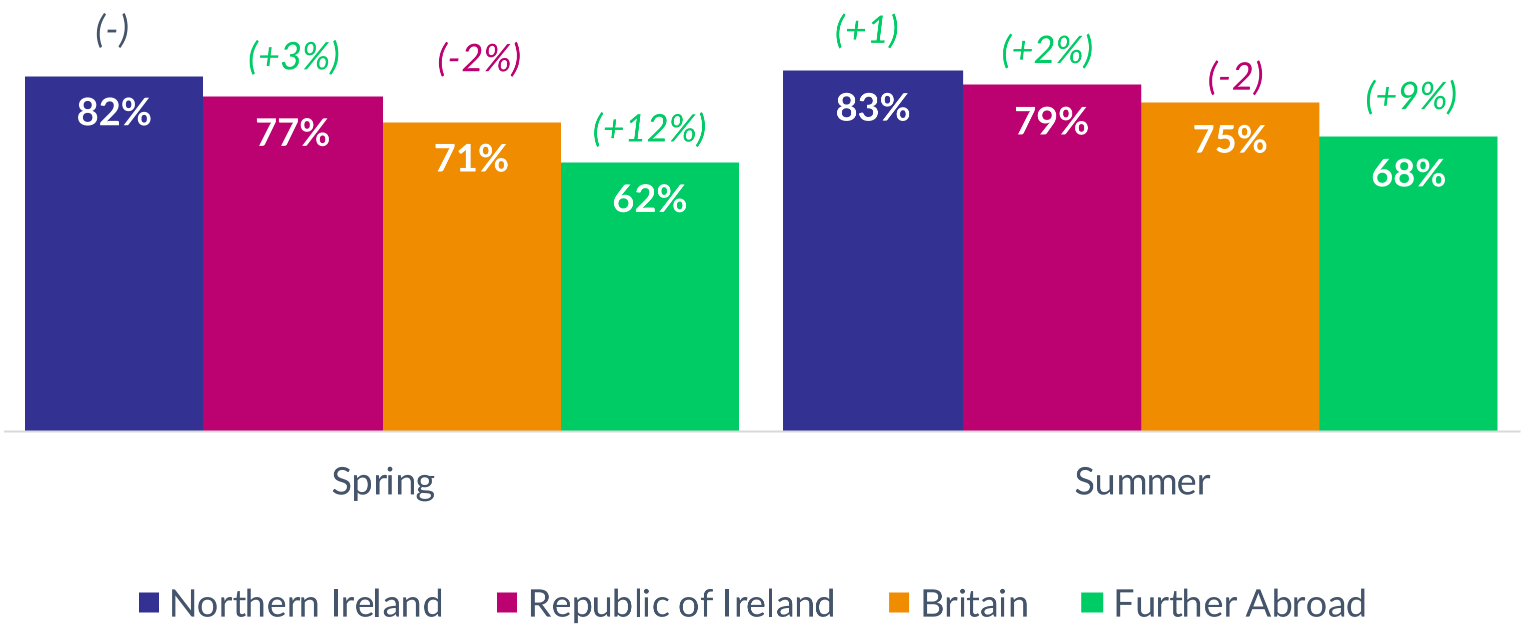
Levels of stress dropping in both markets

28% anxious frequently / all the time in NI; **25%** in ROI. Levels of anxiety do not reflect growing case numbers

Current attitudes towards travel

Holiday safety is also generally stable – with the exception of **trips abroad**, which are now seen as significantly safer than when tested in February

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



Base n= 400

B1. How safe do you think it would be to take a holiday or short break in each of the following locations in April – June 2022? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations in July – September 2022?

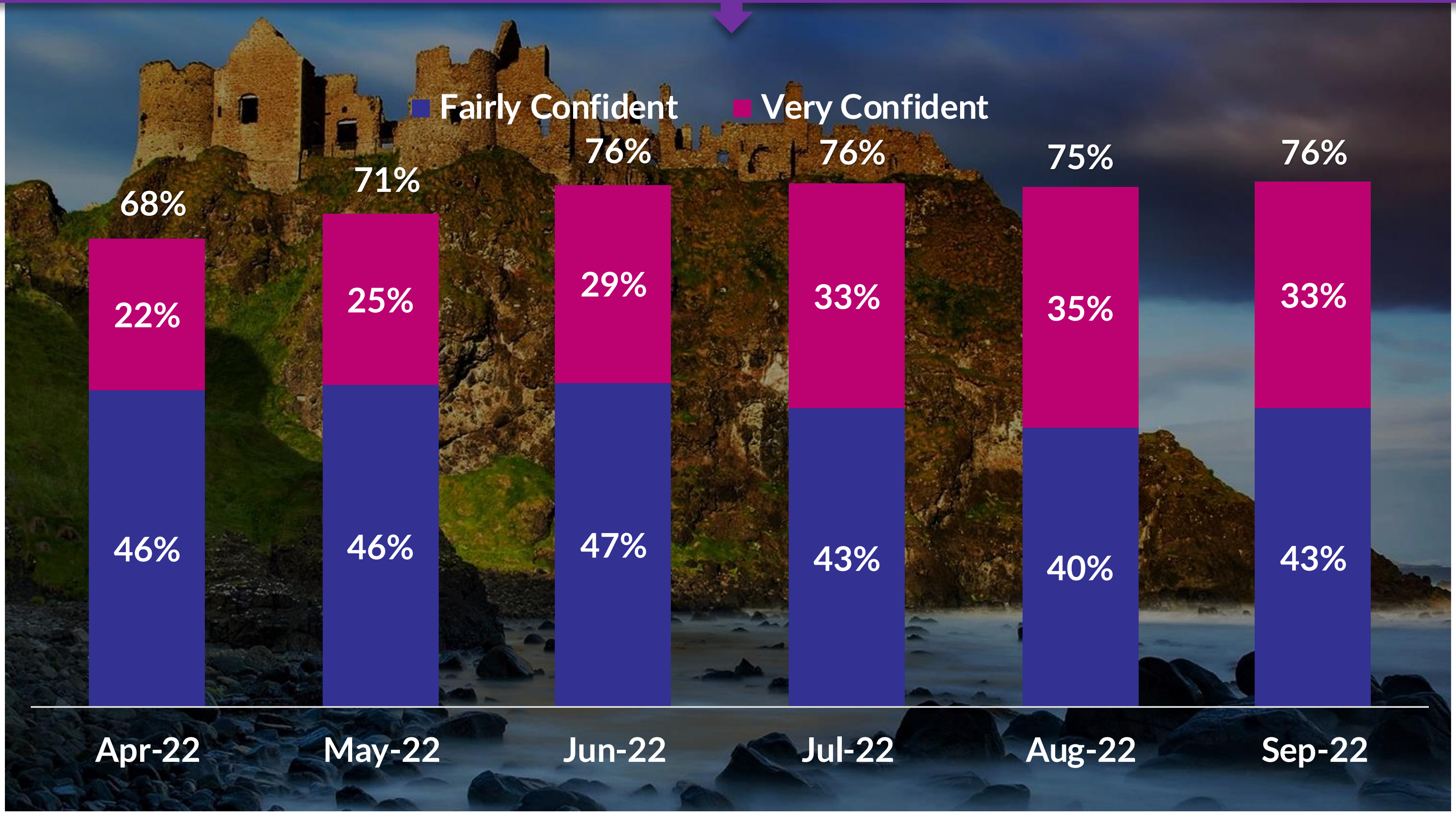
Confidence that a trip would not be cancelled grows compared to February

71%

would be confident in a
y on the Island of Ireland i

W6 (Nov): **36%**
W7 (Feb): **58%**

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

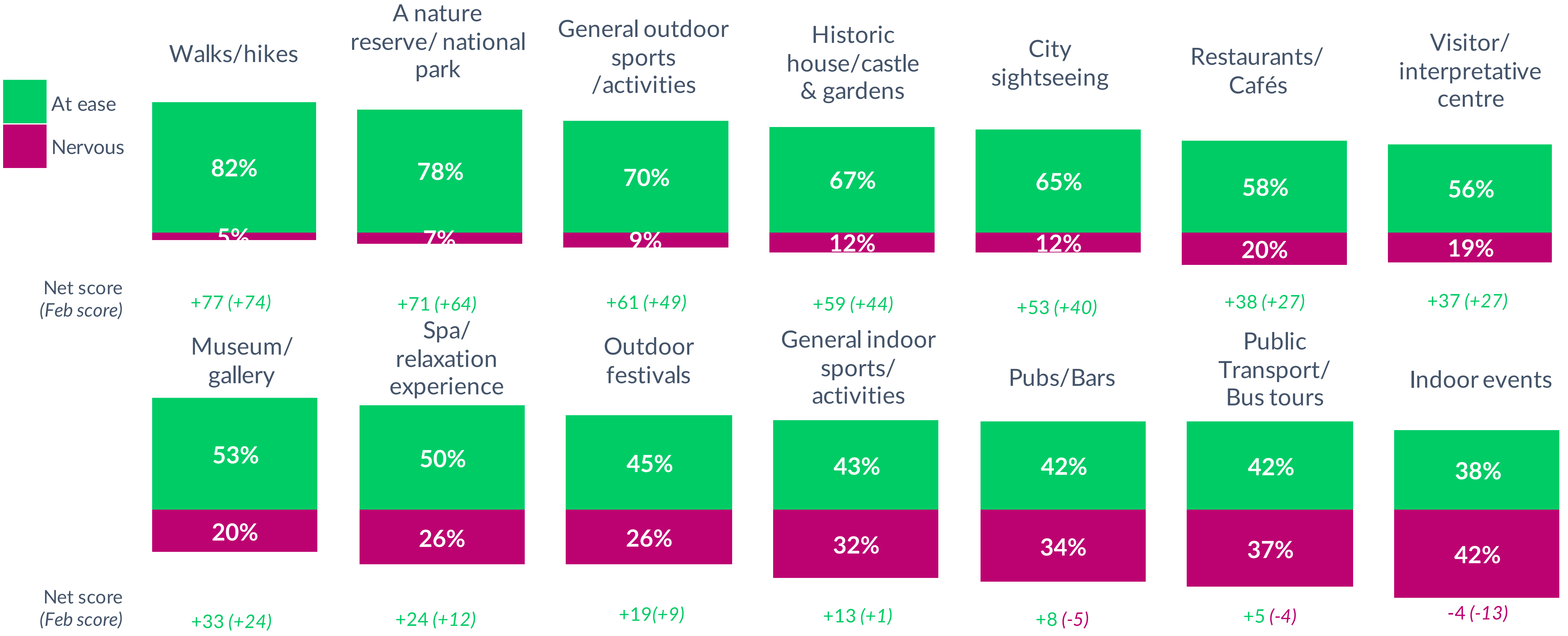


Base n= 400

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)?

Ease with indoor activities continues to grow – now **net positive for pubs and bars**

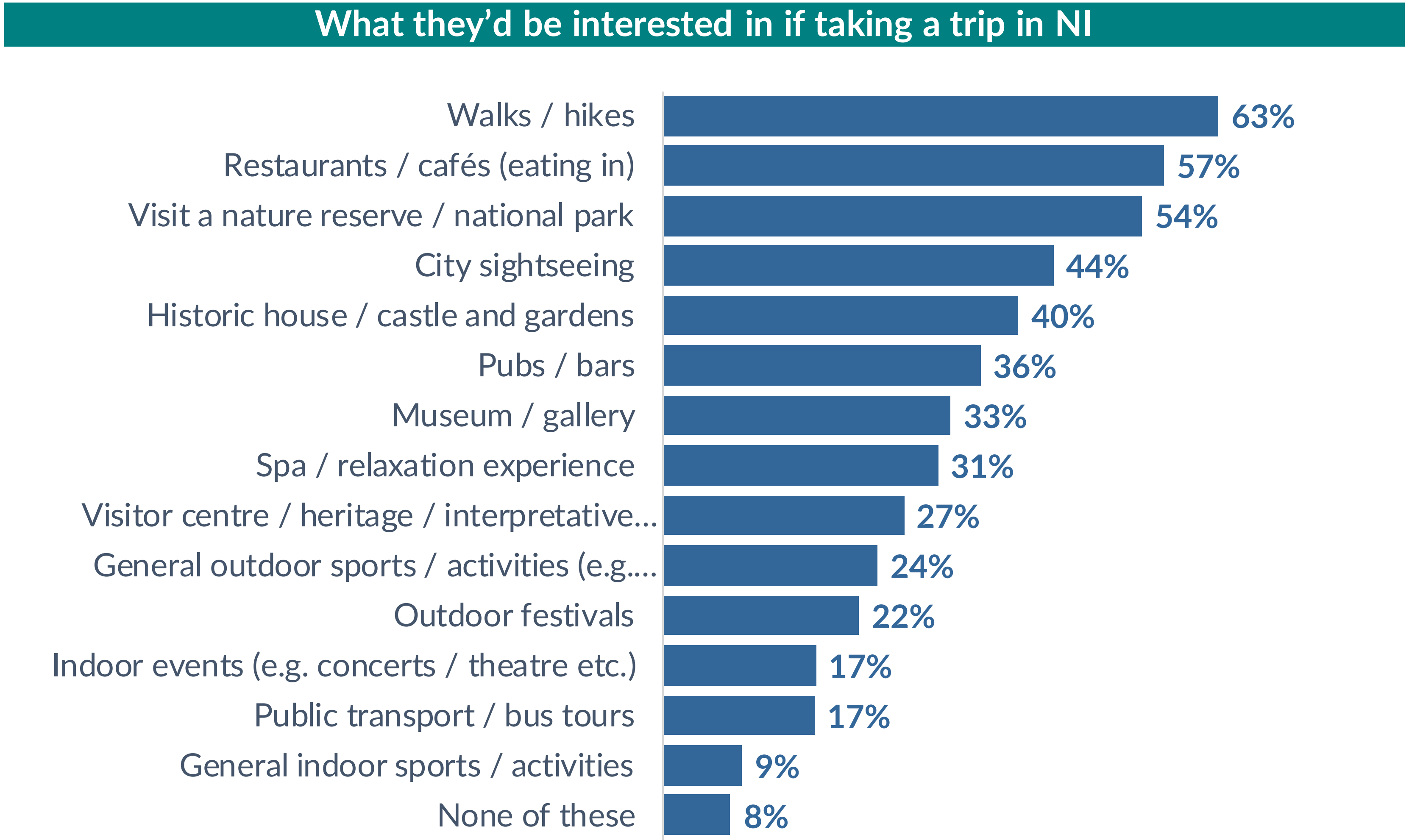
Ease in engaging with activities this spring / summer



Base n= 400

B4. How do you currently feel about engaging in these activities over the next few months (April – June 2022)?

Restaurants and pubs still high priority for those travelling, with walks/hikes the top activity of interest



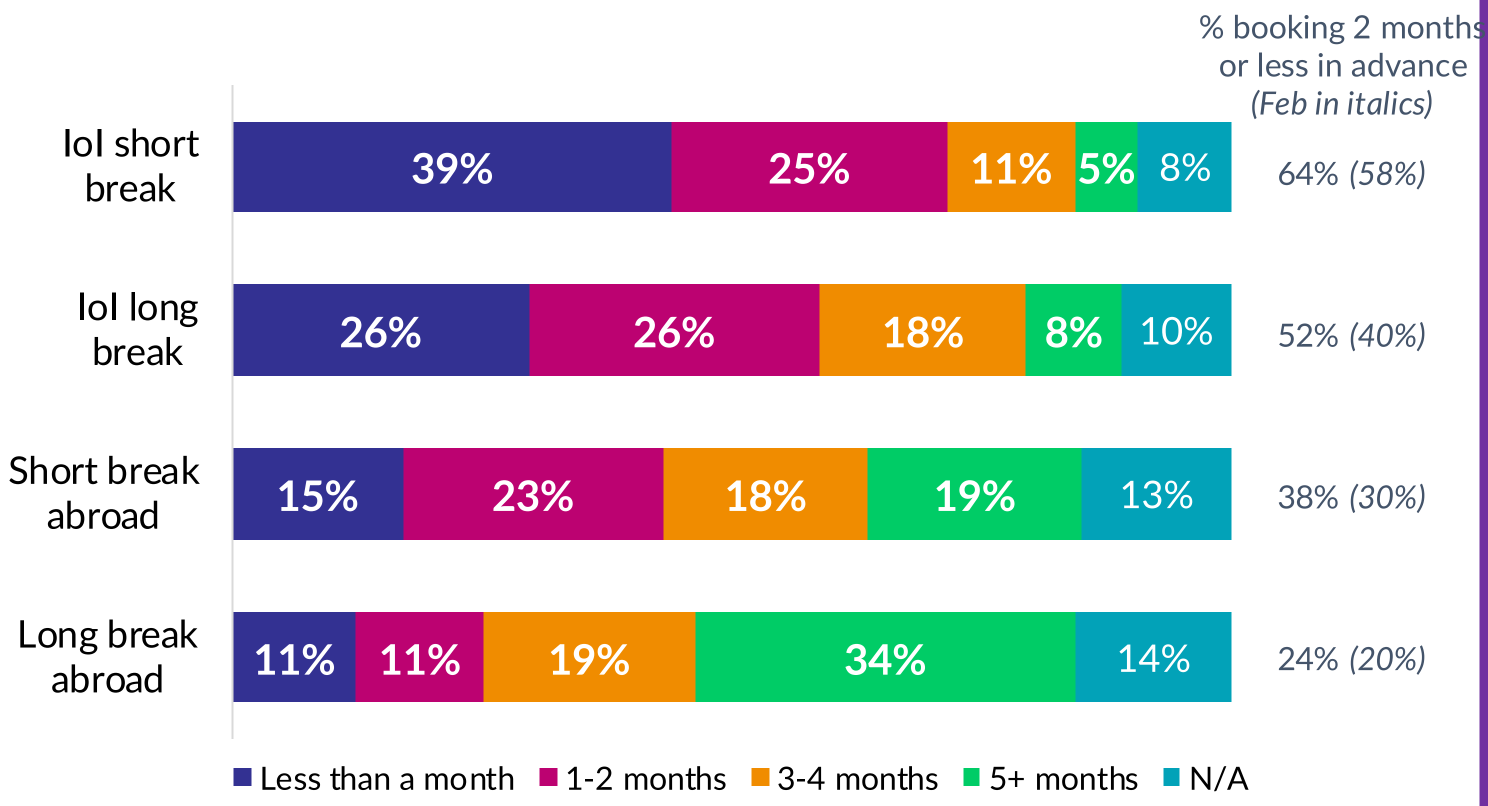
Very little change from last wave – top 5 is the same

Top 5 is also the same for those considering trips in NI – **74%** chose walks / hikes

Base n = 400

B5. If you were to go on a trip in Northern Ireland today, which of the following activities would you consider doing?

When they'd book (if they were booking a holiday now)



Number looking to book holidays within 1-2 months has **grown**

Base n = 400

B6e. 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 spring 2022 (i.e. April – June)?

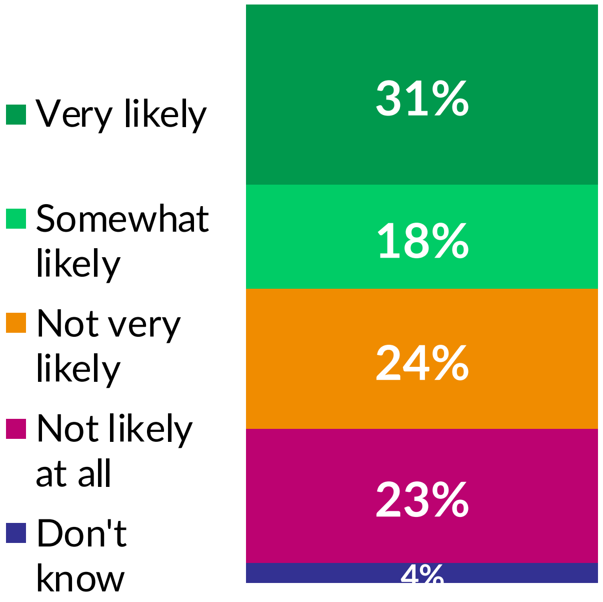
Half of dog owners would consider bringing their dog if holidaying on the Island of Ireland (IoI)

Dog ownership and likelihood to bring on an IoI holiday

44% have a dog

49% of dog owners would be likely to bring their dog if holidaying on IoI

How likely would you be to bring your dog on an IoI holiday?



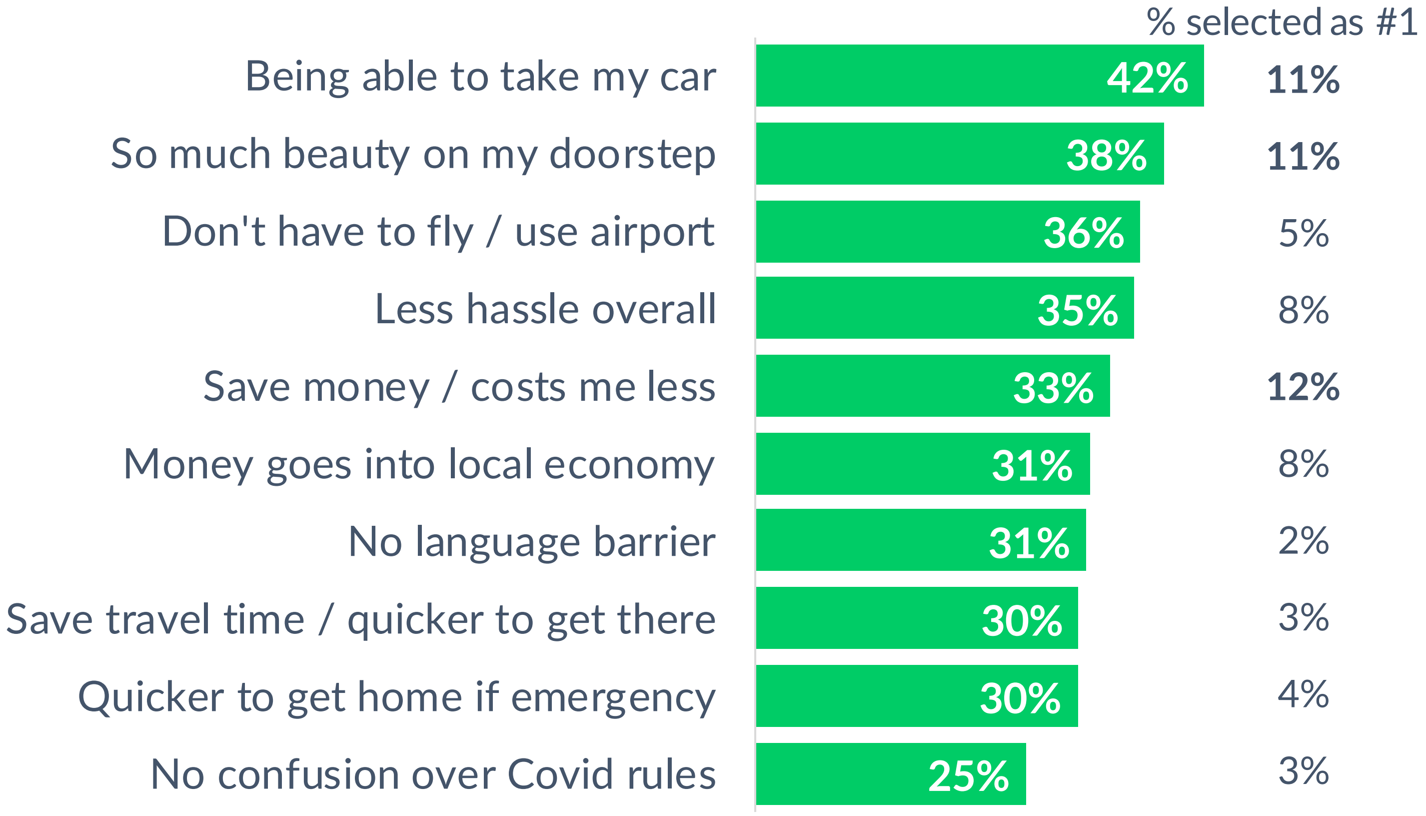
More likely to bring their dog:
- 18-34s **59%**
- Female **55%**

43% said the possibility to bring their dog would **significantly influence their decision** to holiday in IoI rather than abroad

Base n = 400 / 177

E8. Do you have a dog? / E8b. How likely or unlikely would you be to bring your dog if you were considering a holiday or short break on the Island of Ireland? / E8c. And to what extent, if at all, would the possibility of a dog-friendly holiday influence you to holiday on the Island of Ireland rather than going abroad?

Key benefits of a staycation vs. a holiday abroad – top 10



18-34s more likely to select **save money** (42%) and **can take pet(s) with them** (31% vs. 18%)
Over-55s more likely to select that they **can take car** (49%)

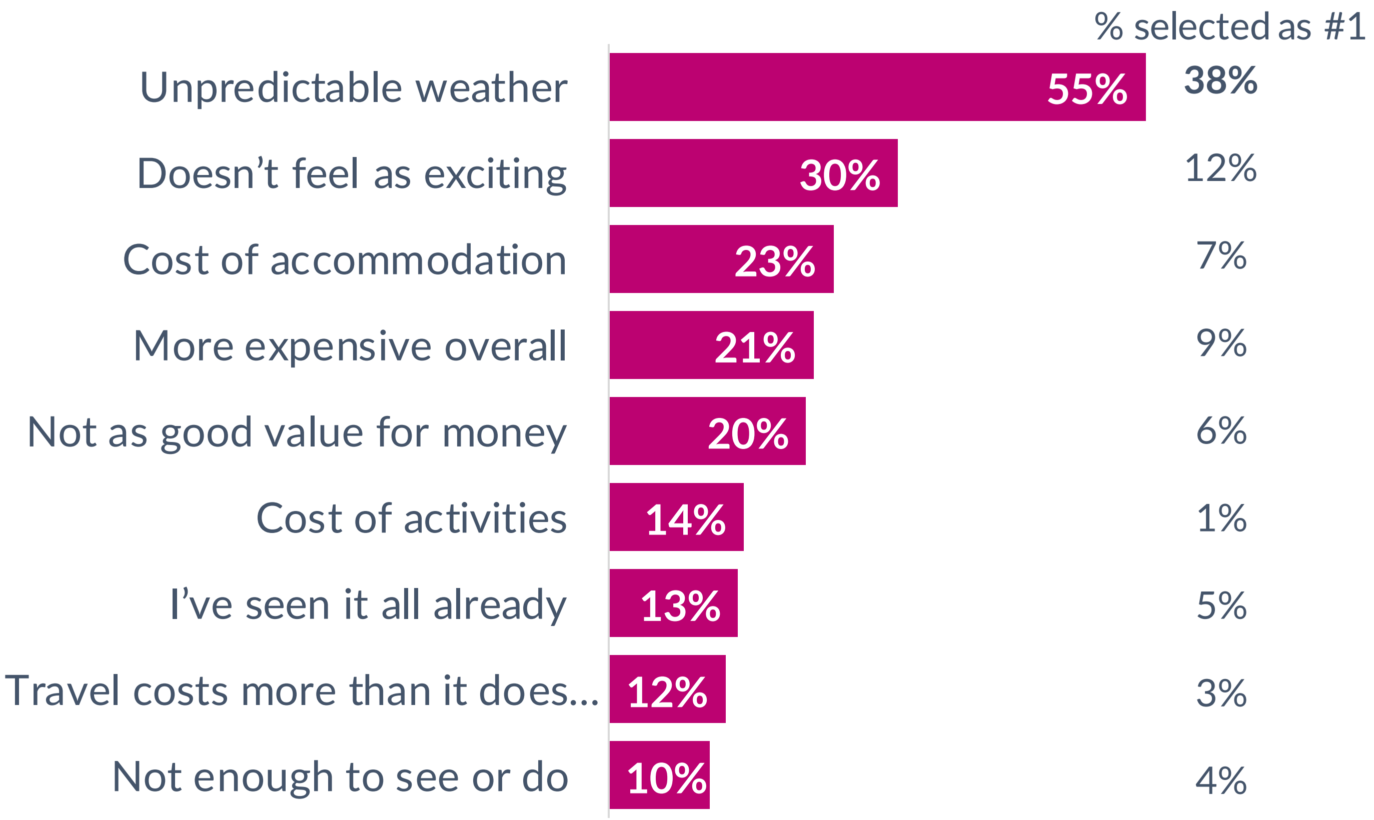
Males more likely to select **less hassle** (41%); females more likely to choose **lack of Covid rule confusion** (30%)

Practical reasons (car/ not flying) are most selected when it comes to positives of a staycation – but NI residents also see the Island of Ireland as **beautiful and inexpensive** to travel in

Base n = 400

F4a. What do you believe to be the KEY BENEFITS or POSITIVES of a “Staycation” on the island of Ireland – over travelling abroad? / F4a. Which would you say is the TOP BENEFIT (one only!) of a “Staycation” on the island of Ireland – over travelling abroad?

Key drawbacks of a staycation vs. a holiday abroad



18-34s more likely to say it **doesn't feel as exciting (42%)** or they've **seen it all (18%)**
35-54s more likely to mention **weather (62%)**

Aspiring Families more likely to pick cost of **activities** (20%). Quality Seekers more likely to select **weather** (66%)

Cost is a consideration for NI residents but **much less so** than for ROI – **weather** seen as the number one drawback by far

Also sense that staycation isn't as **exciting**, especially among younger people

Base n = 400

F4a. What do you believe to be the KEY BENEFITS or POSITIVES of a "Staycation" on the island of Ireland – over travelling abroad? / F4a. Which would you say is the TOP BENEFIT (one only!) of a "Staycation" on the island of Ireland – over travelling abroad?

Market Comparison

Current Attitudes towards Travel

NI now in line with ROI for safety perceptions and level of comfort with activities

Both ROI and NI residents at **83%** in terms of safety perceptions of home market. Net ease with pubs: ROI +4, NI +8 – now very similar outlook in both markets

Different views of staycation benefits/drawbacks when it comes to cost

33% in NI see cost-saving as a staycation benefit vs. just **20%** of ROI residents. And they are much more likely to select **weather** as #1 drawback (38%) rather than overall cost (9%). For ROI overall cost is #1 drawback at 24%

Value for money

NI VFM score, while lower than in late 2022, is well ahead of ROI

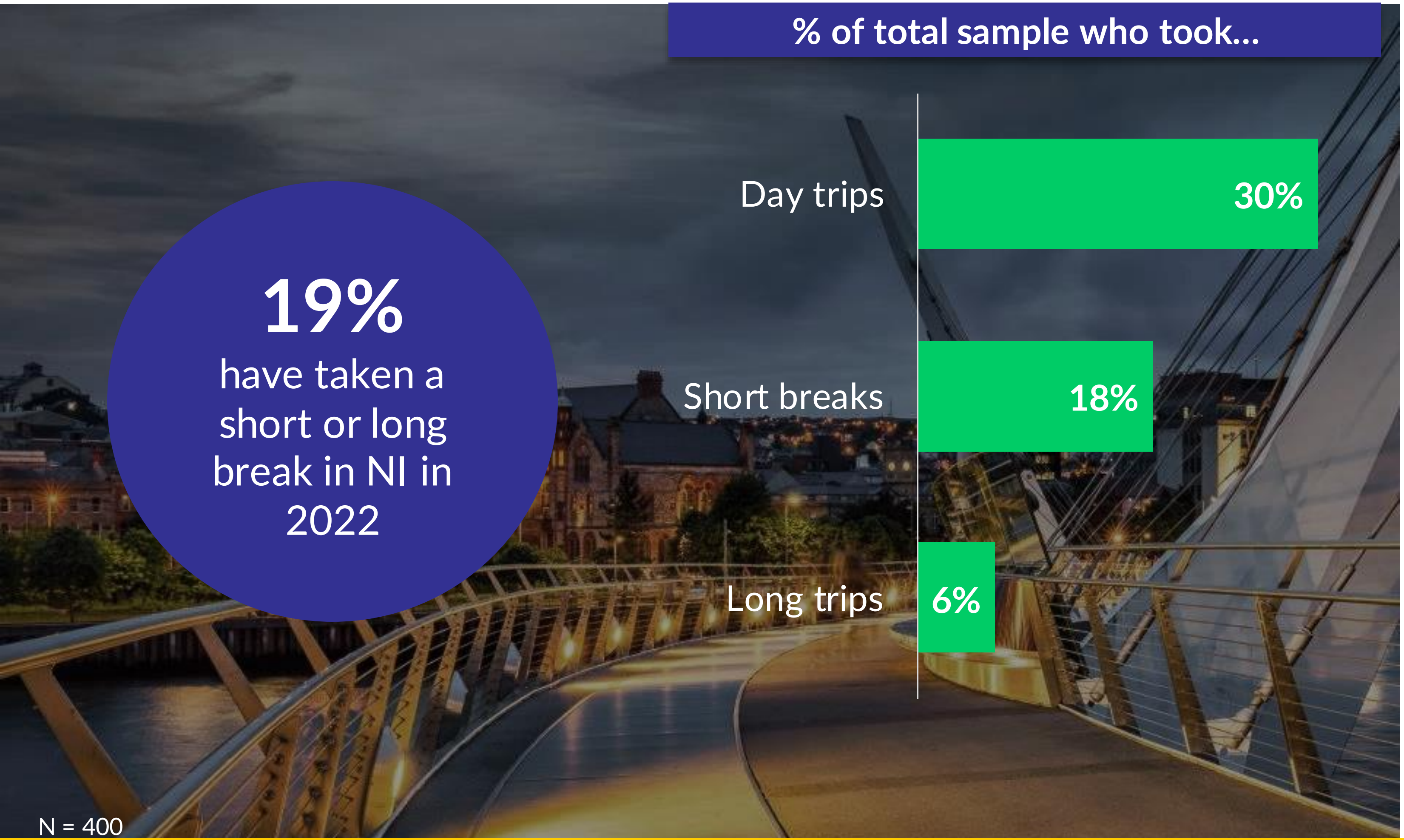
Value for money	Poor value for money	Good value for money	Net Score Mar	Net Score Feb	Net Score Nov
Spain	11%	47%	+36	+38	+40
Northern Ireland	18%	34%	+16	+19	+29
Italy	24%	23%	-1	+6	-6
Great Britain	24%	23%	-1	+6	+8
France	32%	19%	-14	-6	-11
Republic of Ireland	37%	18%	-19	-5	-19

N = 400

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

Travel experiences of NI

One in five has taken a holiday or short break within NI so far in 2022



Other than NI…

23% took a break in ROI

11% went abroad

50% didn't travel at all

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?

How did the trip perform vs. expectations?

		Nov
37%	said their trip **exceeded expectations**	*59%*
57%	said their trip **met expectations**	*33%*
5%	said their trip **didn't meet expectations**	*9%*

When prompted on why they said trip **met** expectations rather than exceeding them, most comments focus on being very experienced travelling within NI so knowing what to expect. A few others mentioned that a good trip was let down by the weather or the volume of people

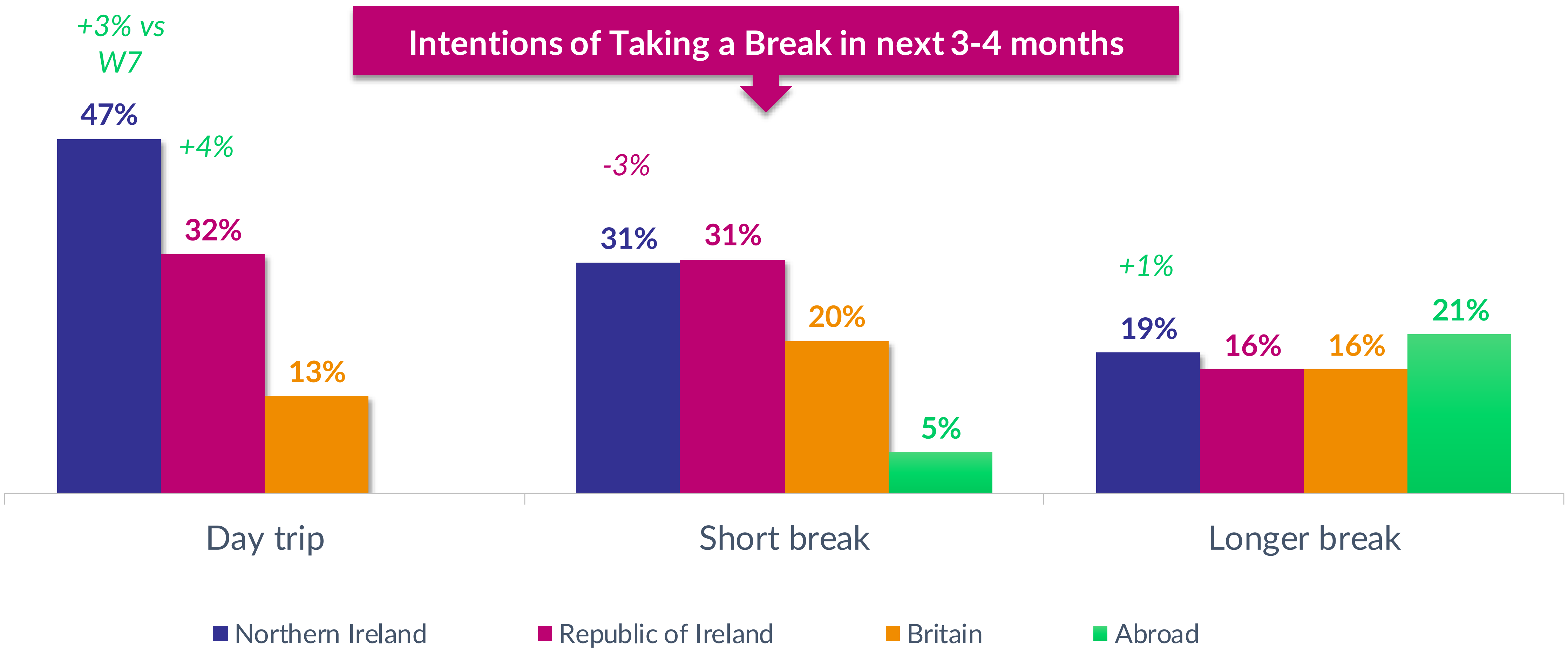
Very high level of trip satisfaction – 95% satisfied with their trip

N=141 visited NI in 2022

D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations?

Travel intent

Day trip intentions up for the next few months but slight dip for short breaks



Base = 400

Short and long break intentions still **well up on last year** – positive signs as Covid anxiety continues to decrease

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

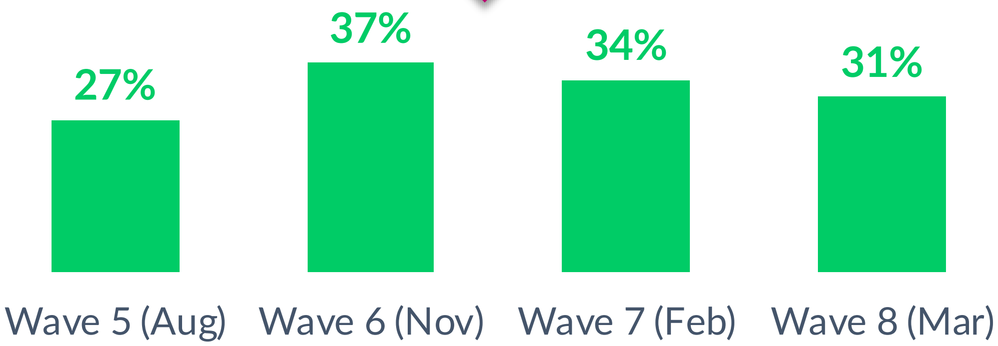
47% Leisure day trip

31% Short break

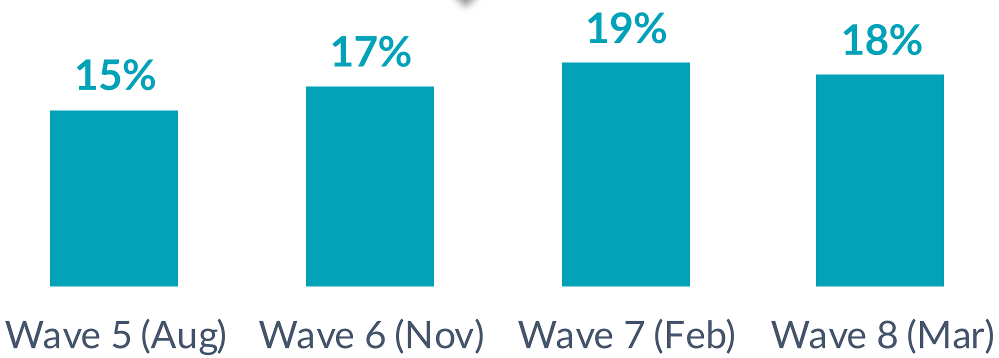
19% Long break

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



Long Break to NI



55% actively planning their short trips (17% of total sample)

36% actively planning their **long trips (6%** of total sample)

Base (n) = 400

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?

Short break consideration has dropped compared to late 2021, but more **actively planning / booking trips now**

N =400

31% considering taking a short break in Northern Ireland

W7: 34% W6: 37% W5: 27% W4: 38% W3: 29% W2: 21% W1: 25%

How much of your short trip have you planned?

N =119

I have booked	Actively planning	Intend to start planning later	May or may not plan
+12%	*+5%*		
24%	31%	24%	21%

55% actively planning their short trips to NI (17% of total sample)

N =119

*Consideration of short breaks to Northern Ireland in:

Apr	May	Jun
31%	28%	41%

17% 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?

Long break consideration primarily for **June** – again, number who **have booked** goes up compared to February

N =400

17% considering a long break in Northern Ireland

W7: 18% W6: 19% W5: 15% W4: 21% W3: 12% W2: 9% W1: 12%

How much of your longer trip have you planned?

N = 68

I have booked (+5%)	Actively planning	Intend to start planning later	May or may not plan
20%	16%	26%	38%

36% actively planning their **long trips (6%** of total sample)

N = 68

*Consideration of longer breaks to Northern Ireland in:

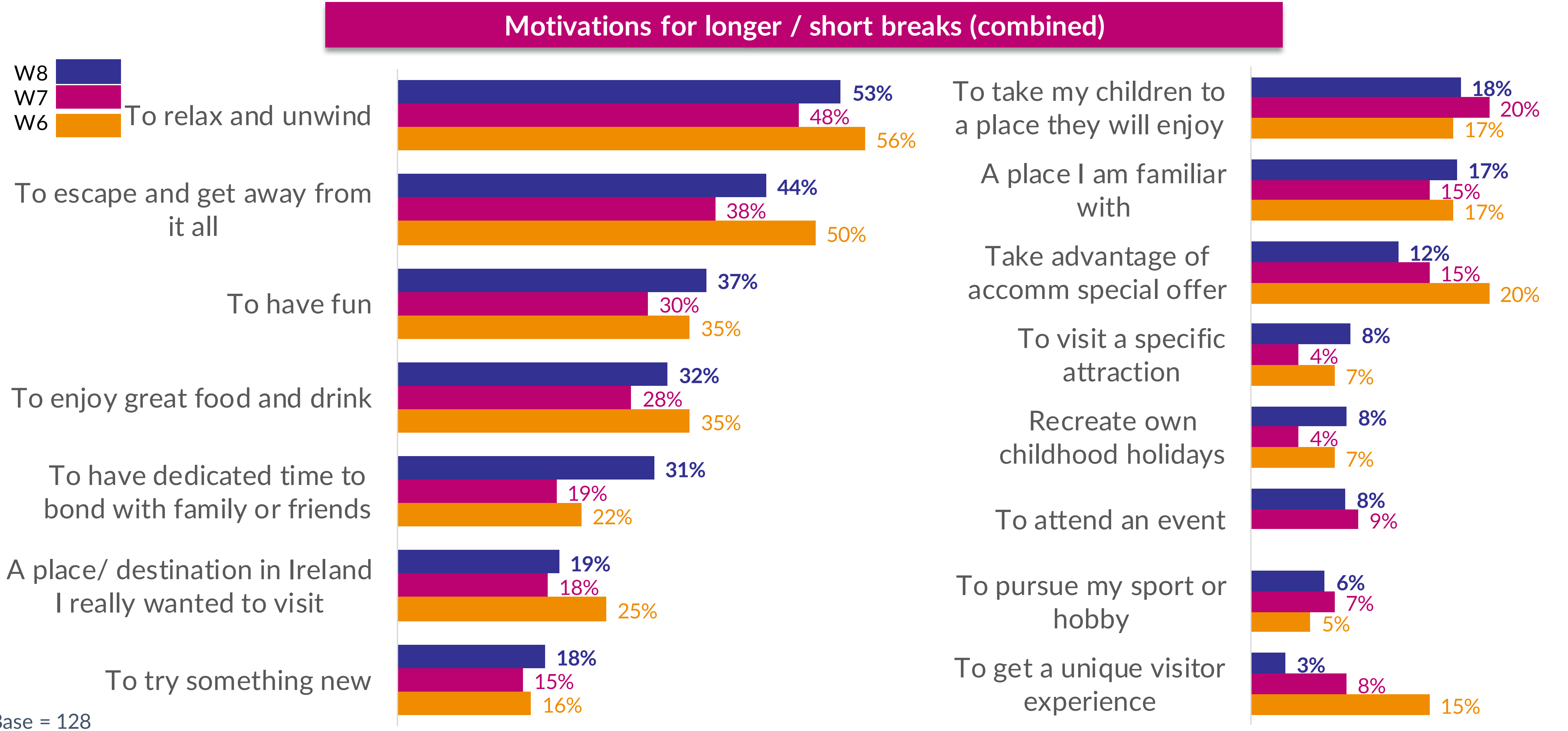
Apr	May	Jun
10%	22%	51%

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?

Positive trends for **relaxation/ food and drink**

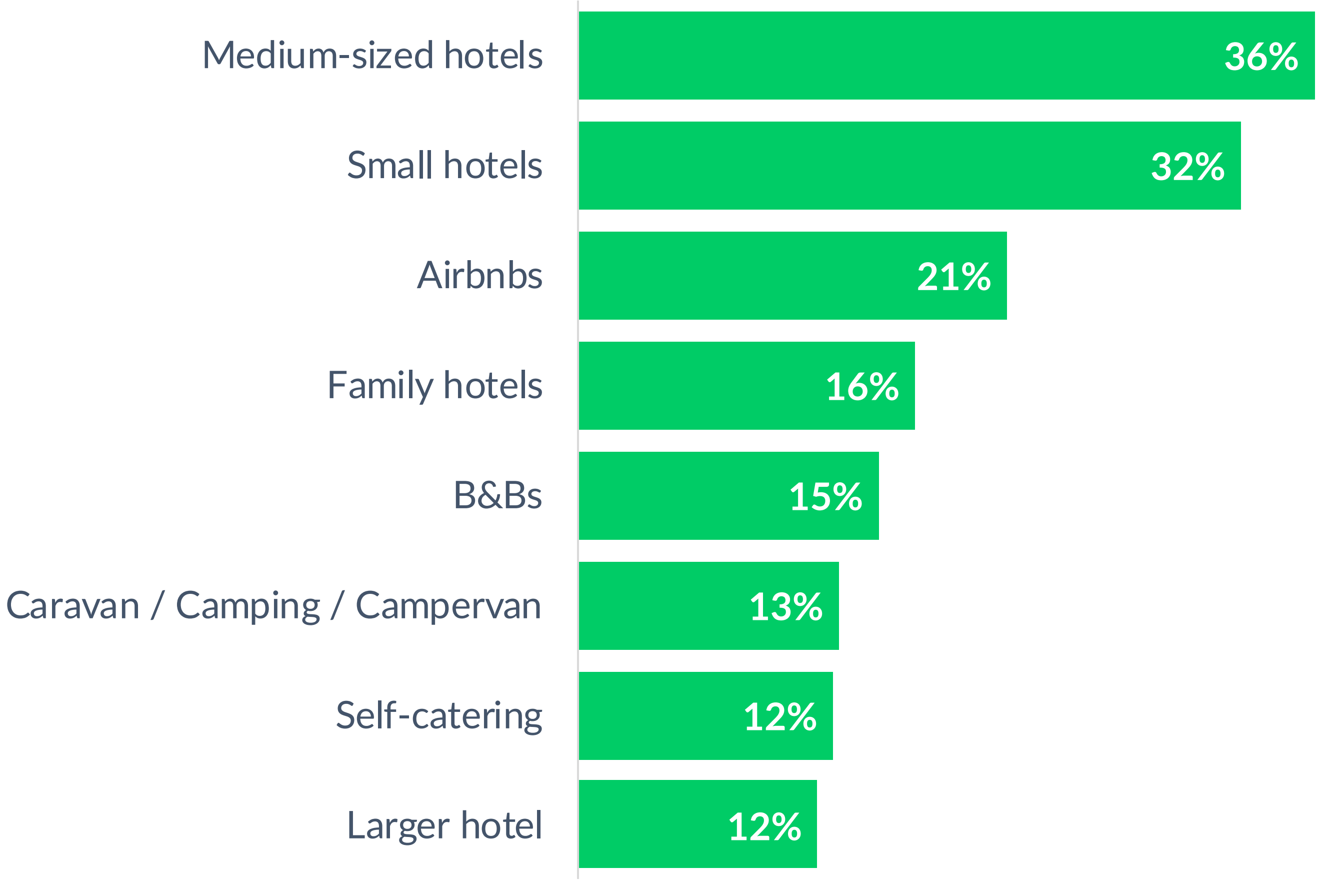


Base = 128

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?

Increase in laid back holiday preference, with medium/small hotels still the key destination

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



Who travelling with (long & short combined)

- 53% Partner / spouse
- 44% Immediate family
- 16% Friends

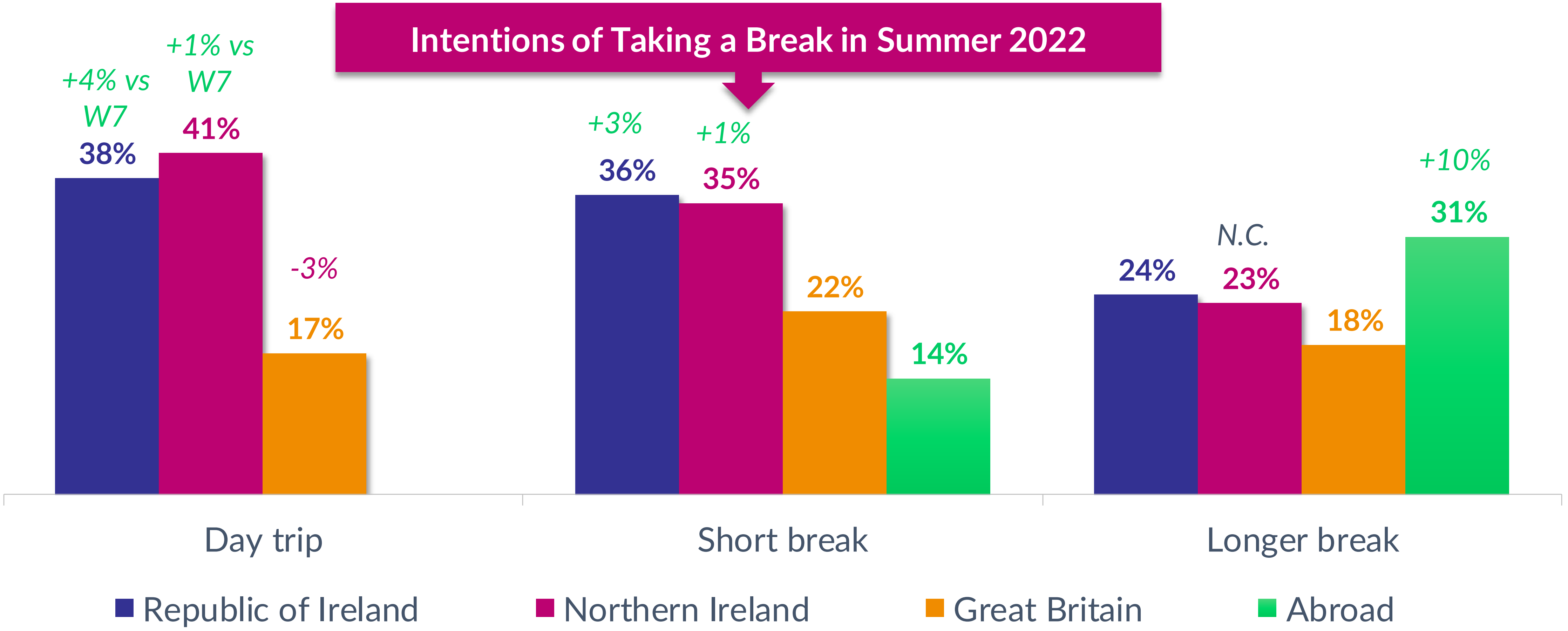
Type of trip preferred

- 56% Laid back holiday
- 10% Exciting holiday
- 35% A bit of both

Base = 128

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? / E8. You mention you have taken or booked a holiday or short break in Northern Ireland. How far in advance of the trip did you...

NI summer intentions **stable** compared to Feb – but trips **abroad**, and to a lesser extent to ROI, on the increase as confidence to venture out of NI grows



Base = 400

Multiple Questions

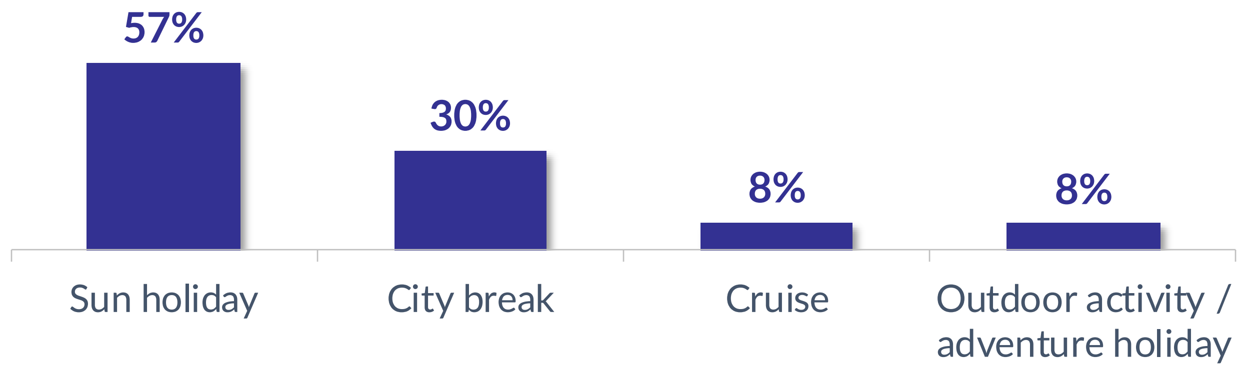
Number **actively planning** trips abroad in next few months grows – **sun** the key motivator, more so than pent-up demand

24% of total sample are considering a break abroad in the next 3-4 months

63% of this cohort are actively planning or have booked their trips

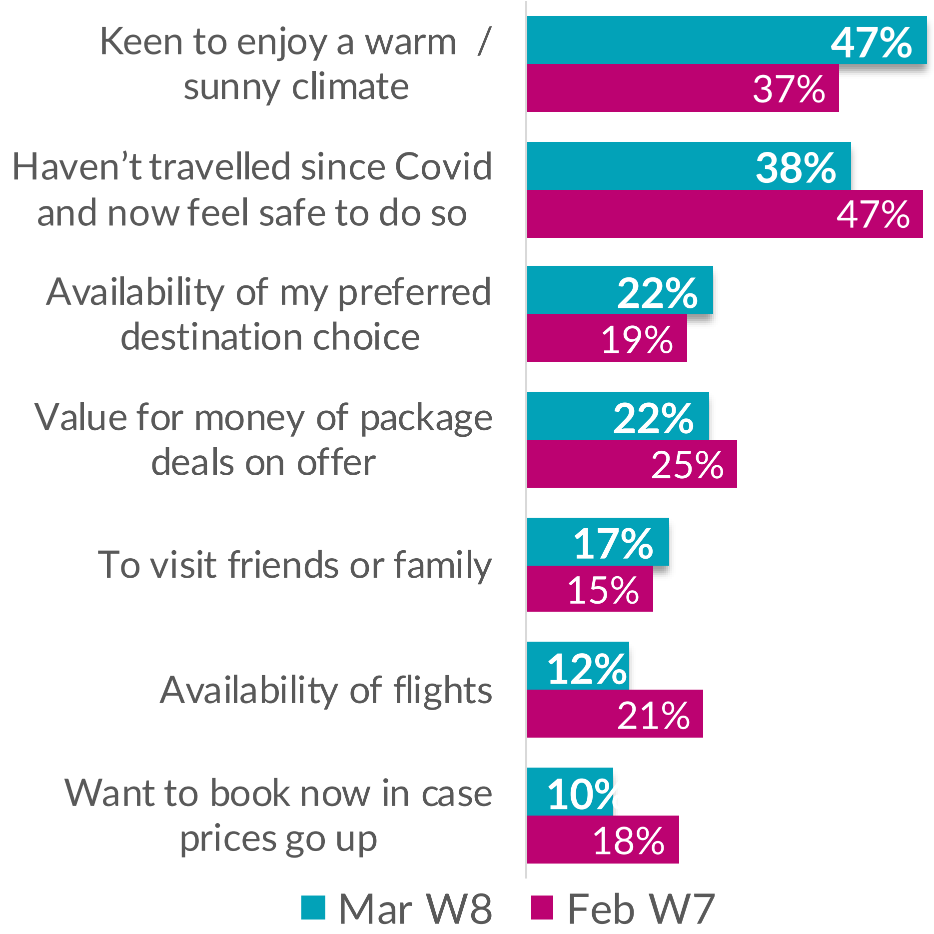
In Feb, 23% were considering a break abroad and 54% of this cohort were actively booking or had booked their trips – consideration has not grown but more are **looking actively at trips**

What type of trip are you considering?



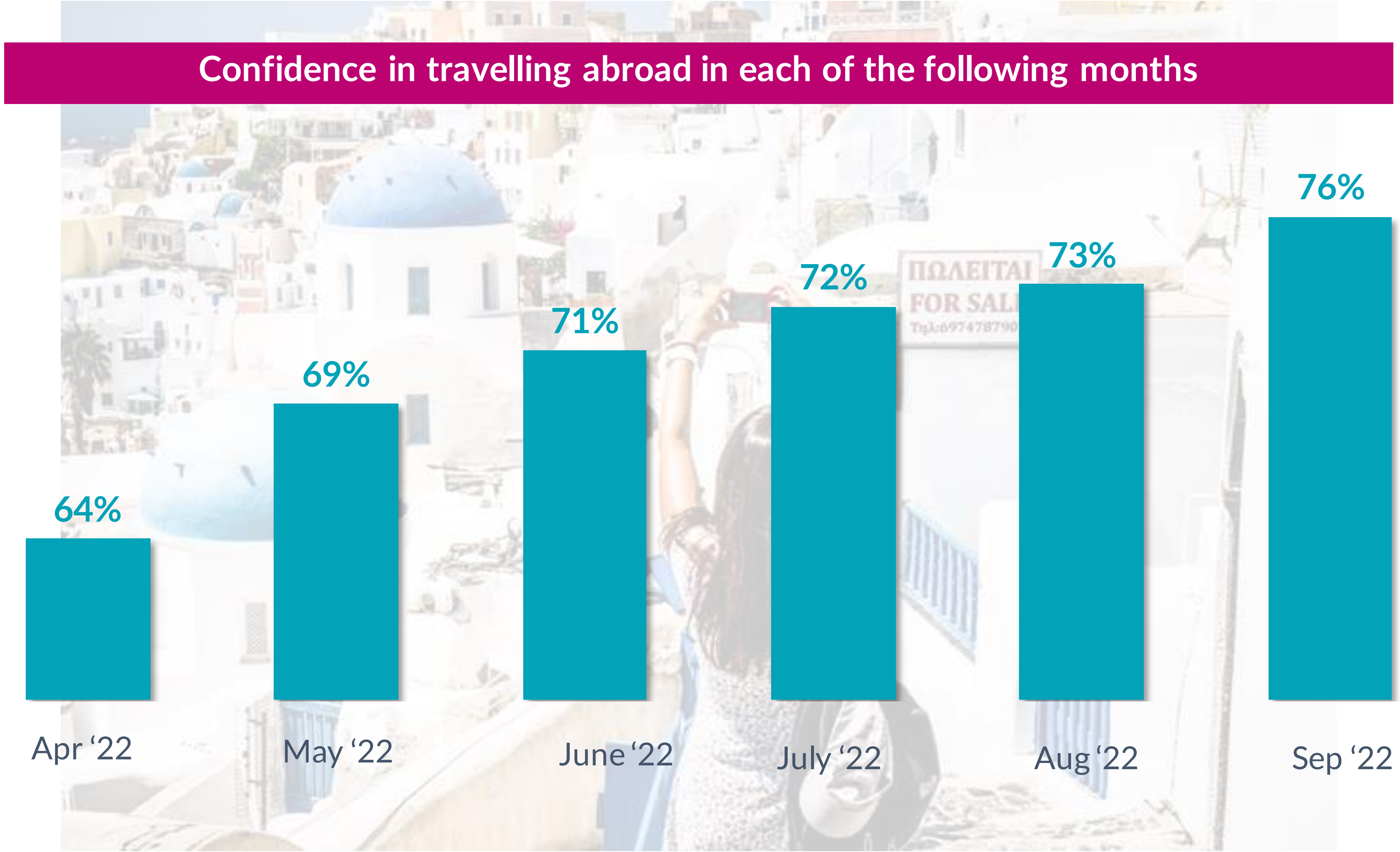
Base = 94 considering trip abroad

Reason to consider a trip abroad April – June



E14. You mentioned that you are considering taking a break abroad in the next 3-4 months (i.e. between April and June). Have you booked or thought about planning this trip abroad? E15b. What has encouraged you to consider a holiday or short break abroad between April and June? E15. What type(s) of holiday or short break abroad are you considering?

Confidence grows in the short term for travel abroad – two thirds would now feel comfortable with a trip abroad



In February, **53%** felt travelling in March would be safe, and **74%** felt travelling in Aug would be safe

Base = 400 total sample

E15c. How confident are you that you would be able to go on a holiday or short break abroad in the following months (i.e. you won't have to cancel)?

Market Comparison

Travel Intent

Travel intentions stable in both markets

31% intend to take a short break in NI, similar to February.

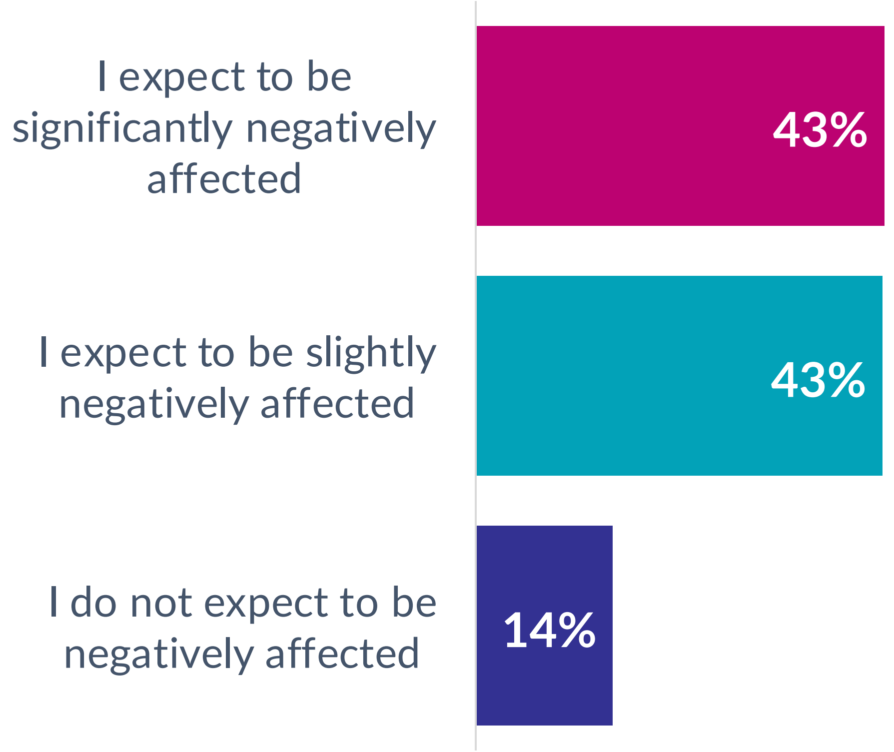
Significant jump in summer travel abroad interest in NI, while ROI intentions remain high

NI now similar levels of interest for summer travel abroad (31%) to ROI (35%). This is a jump from 21% and reflects growth in Covid comfort in NI that we saw in ROI last wave

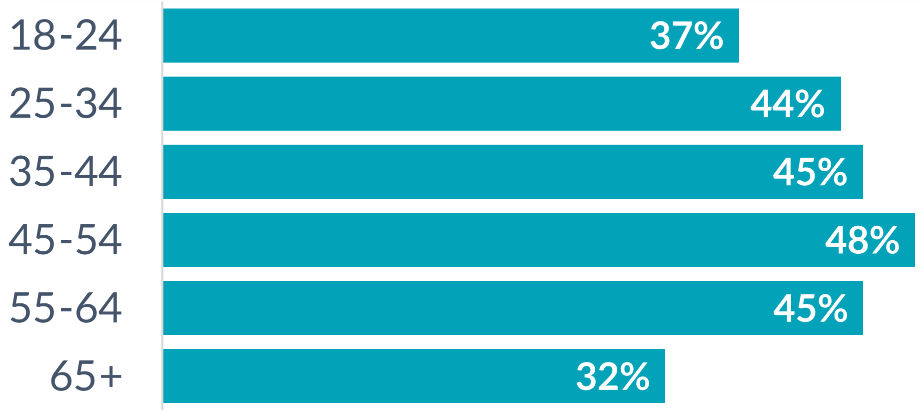
Cost of living & Ukraine

Most expect to be hit by cost of living – especially **pre-family** and those in the 35-54 age range

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



% expect to be 'significantly' affected, by age



Also more likely to be significantly affected:

- **Pre-Family** 49%
- **Quality Seekers** 50%

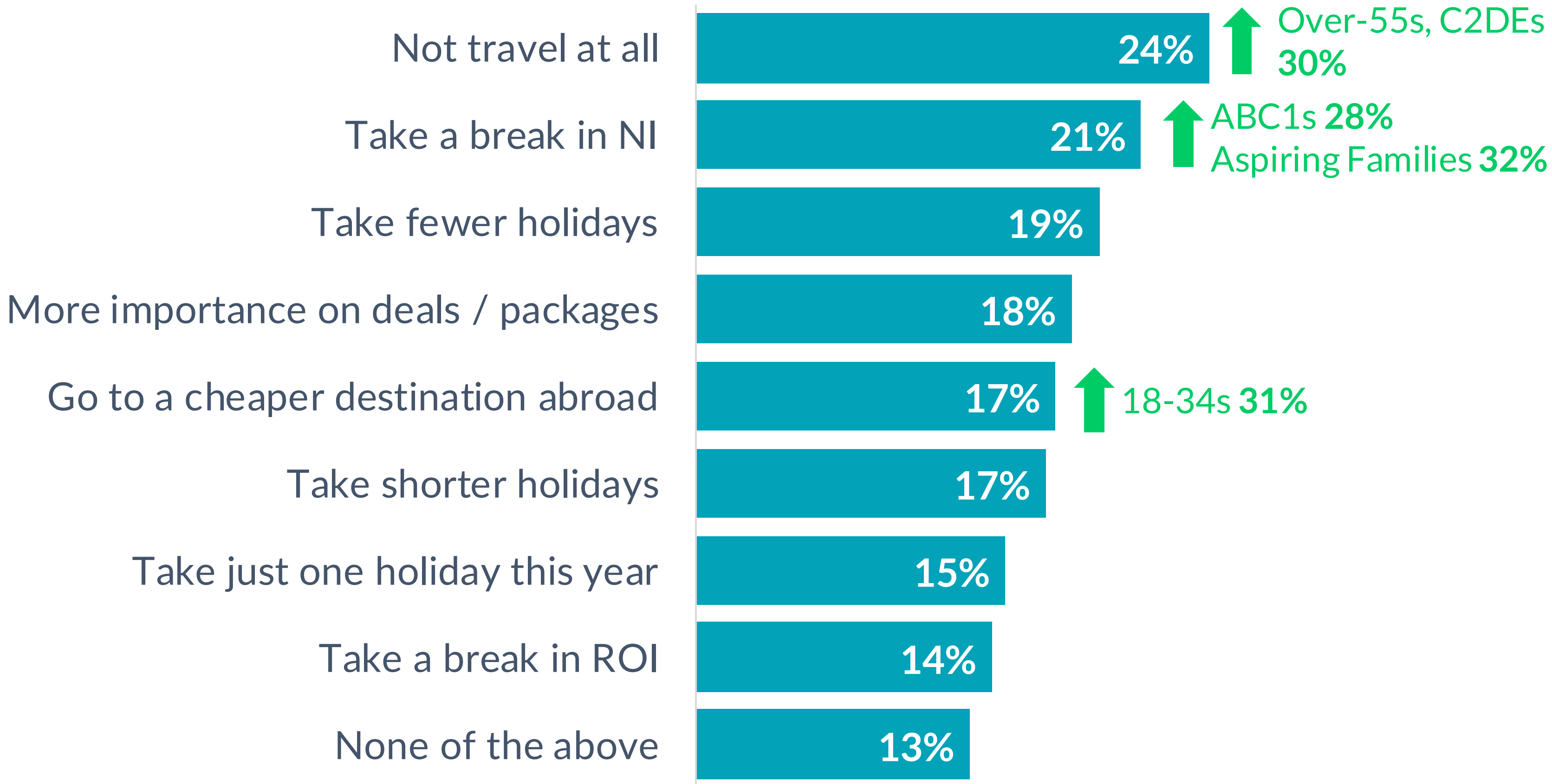
Older Family less likely to be significantly affected (35%)

Base n = 400

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

1 in 5 considering an NI staycation to save money due to cost of living

Those impacted by cost of living – what they'll do re holidays



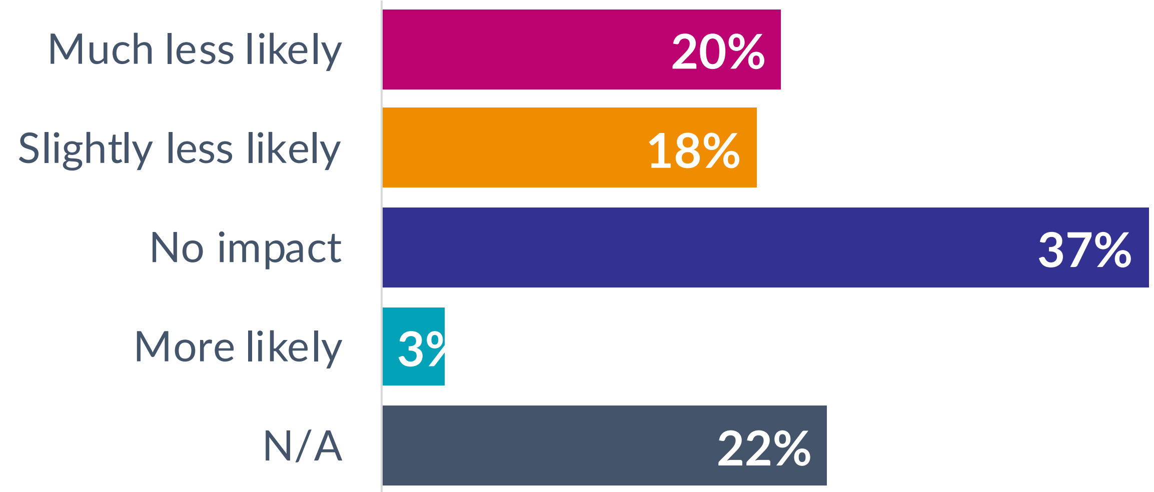
Base n = 343

F2. As a result of cost of living increases, which, if any, of the following are you more likely to do in 2022 when it comes to holidays and short breaks?

38% are less likely to consider mainland Europe as a result of the Ukraine situation

Base n = 400

Impact of Russia-Ukraine conflict on likelihood to consider a holiday in mainland Europe



Young families in particular – nearly 3 in 5 less likely to consider mainland Europe for a holiday as a result of the conflict

Less likely than average to consider:

- **Young family** 56%
- **ABC1s** 48%
- **Aspiring Families** 47%
- **18-34s** 46%

F3. Thinking now about the situation in Ukraine, to what extent, if at all, would this impact on your likelihood to take a holiday or short break in mainland Europe in 2022?

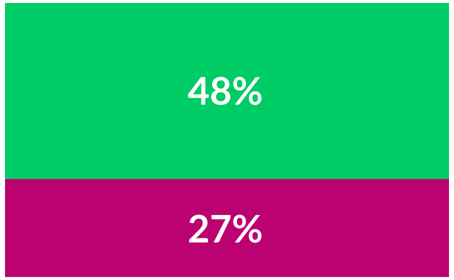
Events

Perception of Safety this Spring / Summer - Outdoor Event

Safe
Unsafe

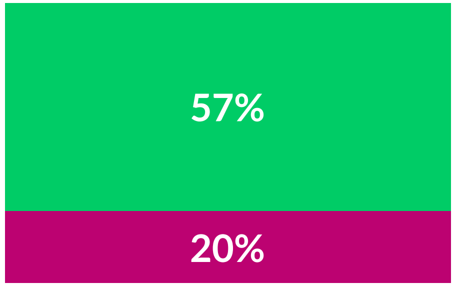
Large Outdoor Event

(+1% vs Feb)



Small Outdoor Event

(+3%)

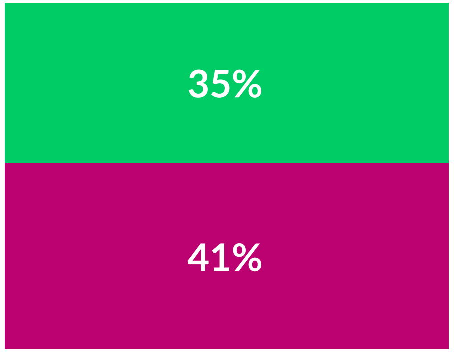


Perception of Safety this Spring / Summer - Indoor Event

Safe
Unsafe

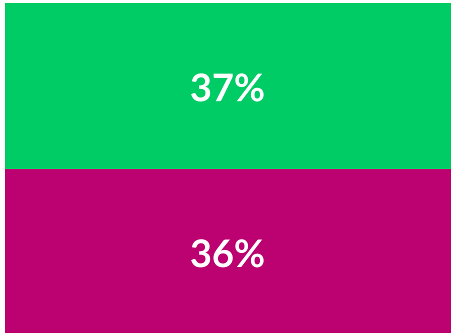
Large Indoor Event

(+3%)



Small Indoor Event

(+3%)



Base n = 400

All event types see slight increase in perception of safety compared to February

G1. How safe would you feel attending the following live event types in April – June 2022?

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

tourism northernireland

SPARK The Strategic Insight Agency