

Tourism Northern Ireland
Consumer Sentiment Research
NI Market – wave 14

April 2024





Research background



Research background & objectives

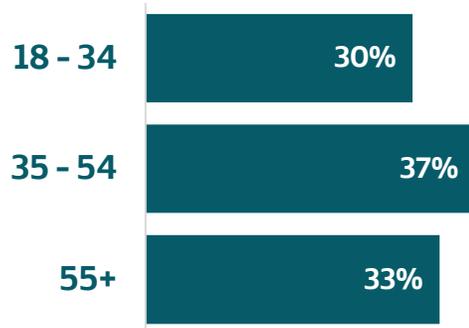
This is the 14th wave of our consumer sentiment research in Northern Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere.

Objectives:

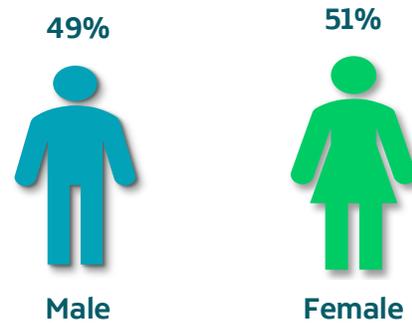
- Understand recent travel experiences in NI.
- Assess current attitudes towards travel in NI, ROI and further afield.
- Understand what impact cost of living increases and other broader factors are having on the above.

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

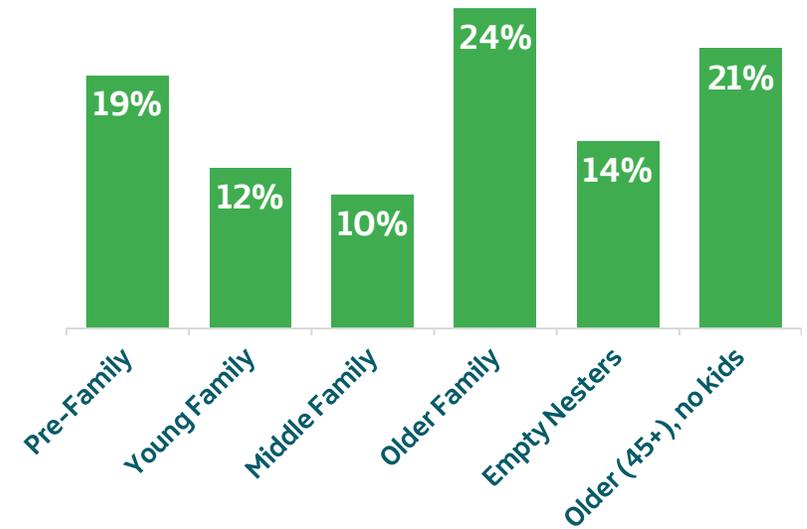
Age



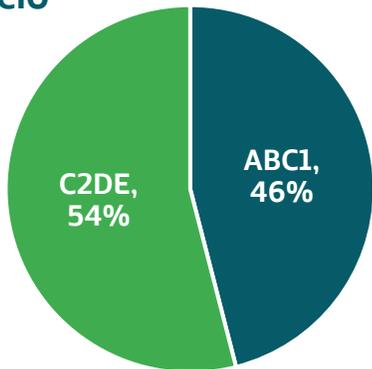
Gender



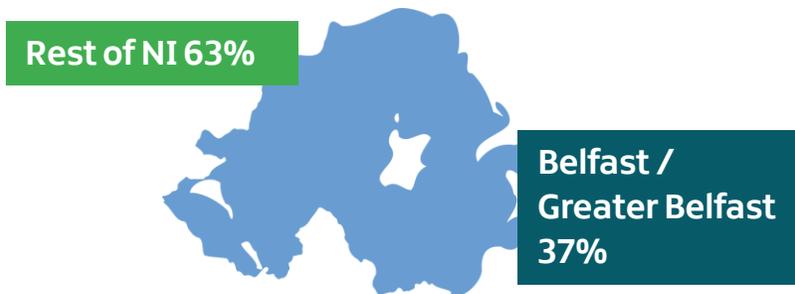
Lifestage



Socio



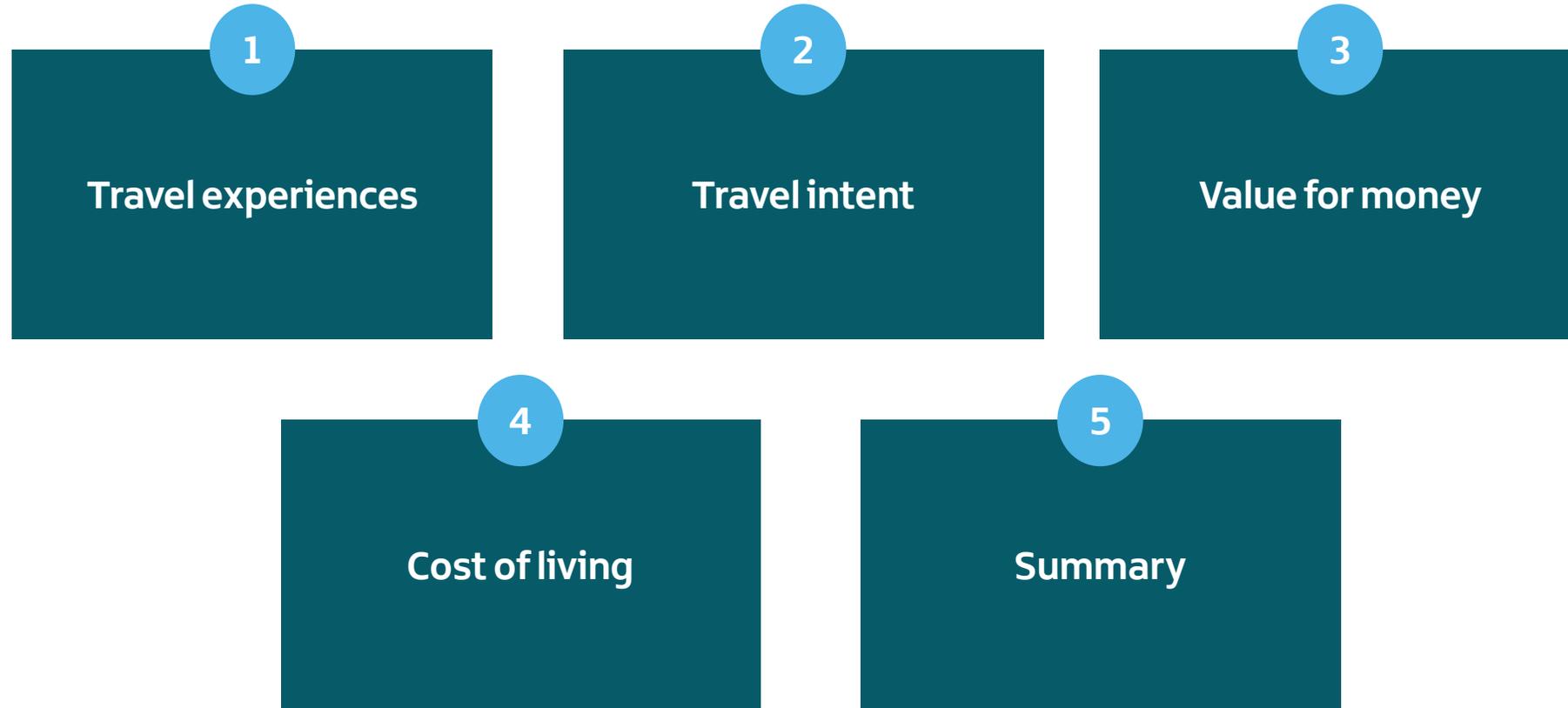
Region



**Total sample
– 400 NI
consumers**

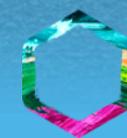


Contents





Travel experiences



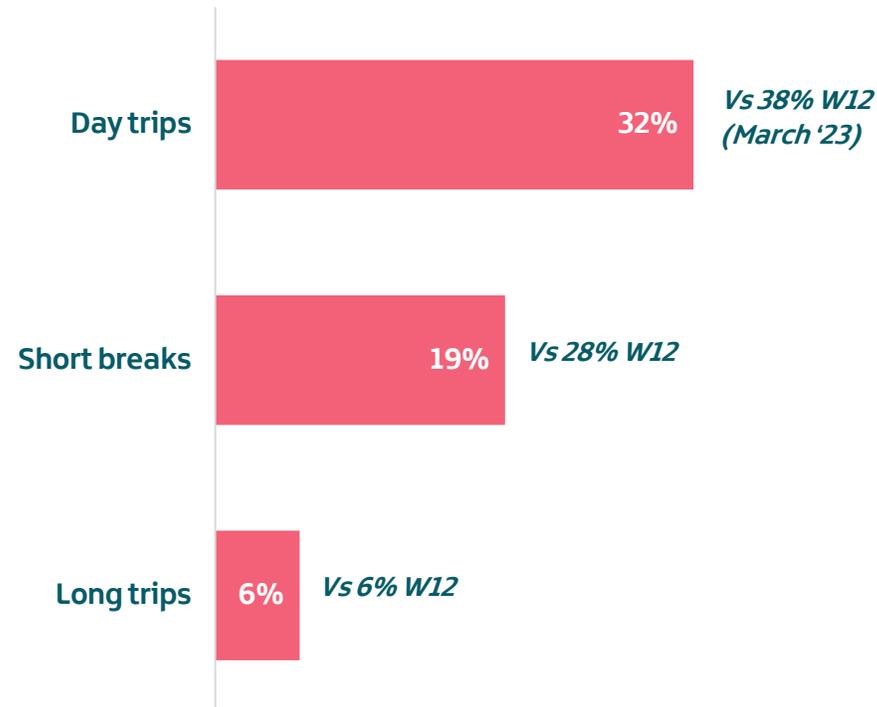
TOURISM
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People took fewer day/short trips early this year compared to last – considerable increase in those not travelling at all

20%

have taken a short or long break in NI in 2024

% of total sample who took a trip in NI



Other than NI...

23%

took a break in ROI

Vs 25% in W12

17%

went abroad

Vs 21% in W12

56%

didn't travel at all

Vs 48% in W12



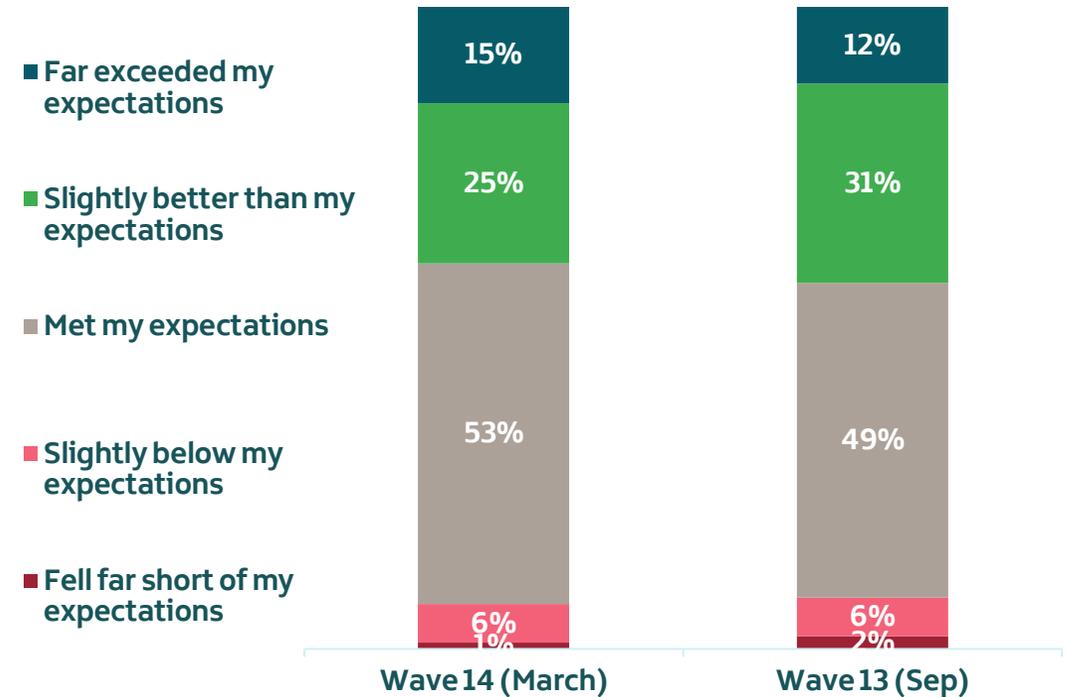
TOURISM
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People's expectations continuing to be met or exceeded

93%
had their expectations met or exceeded

Vs 92% in Wave 13 (September)

Those who visited NI felt their trip...



People and range of things to see and do very much at forefront of positive experiences – weather a downside

What people liked / would recommend about their trip in NI

People

The friendliness of people here, all you have to do is ask a passerby where they'd recommend, and they will give you some brilliant choices

I think Northern Ireland is a fairly gorgeous place to visit and that the people are so welcoming. It's a nice place for a quieter trip for sure

I go out for trips with my elderly friend and disabled granddaughter, and I cannot fault the help and reception we get wherever we go

Beauty / things to see and do

The sights around Bushmills, Giant's Causeway, etc., are brilliant. Belfast has so much to see, and Derry has so much going for it

Visit hidden gems e.g., Tollymore Forest Park

I would especially recommend the area around the Mourne Mountains as the scenery is breathtaking.

Good experiences in spite of the weather!

People were pleasant, plenty of activities suitable for adults and children, I disliked the distance between each city and the weather

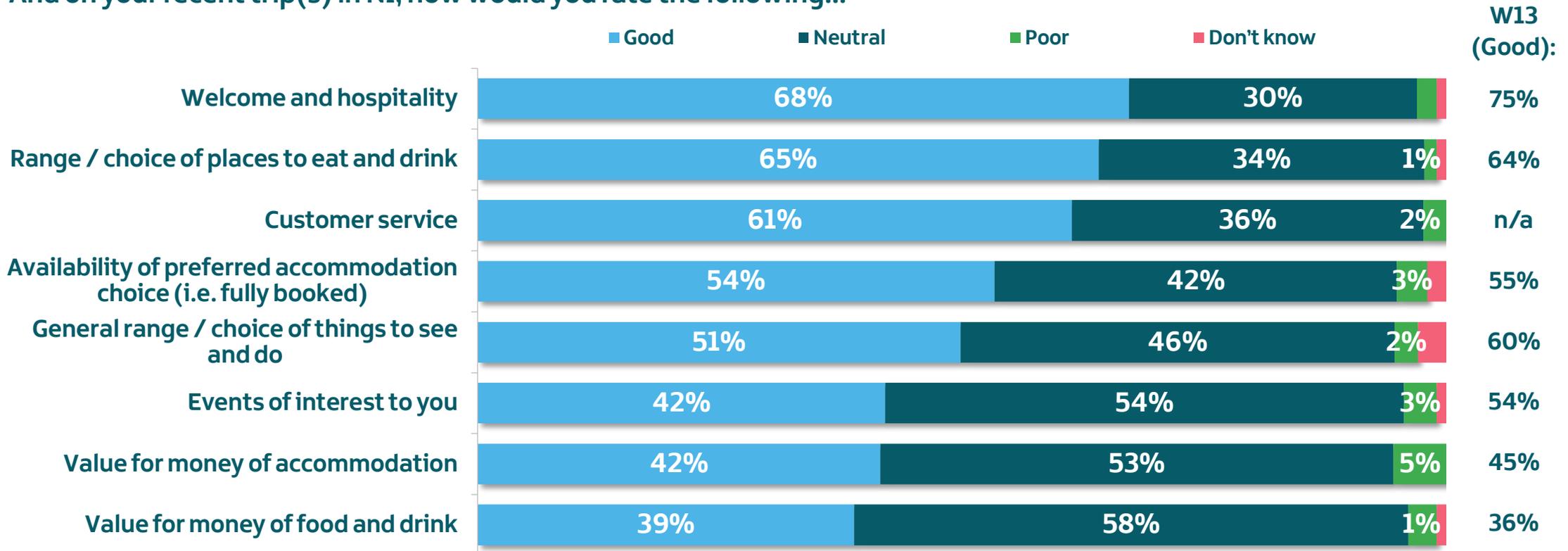
The biggest reason I enjoyed this trip was because of the people I met and the views I saw. I have very few dislikes, such as the weather

I liked the culture, history, attractions, food & shopping. Disliked the weather & how far it is between attractions



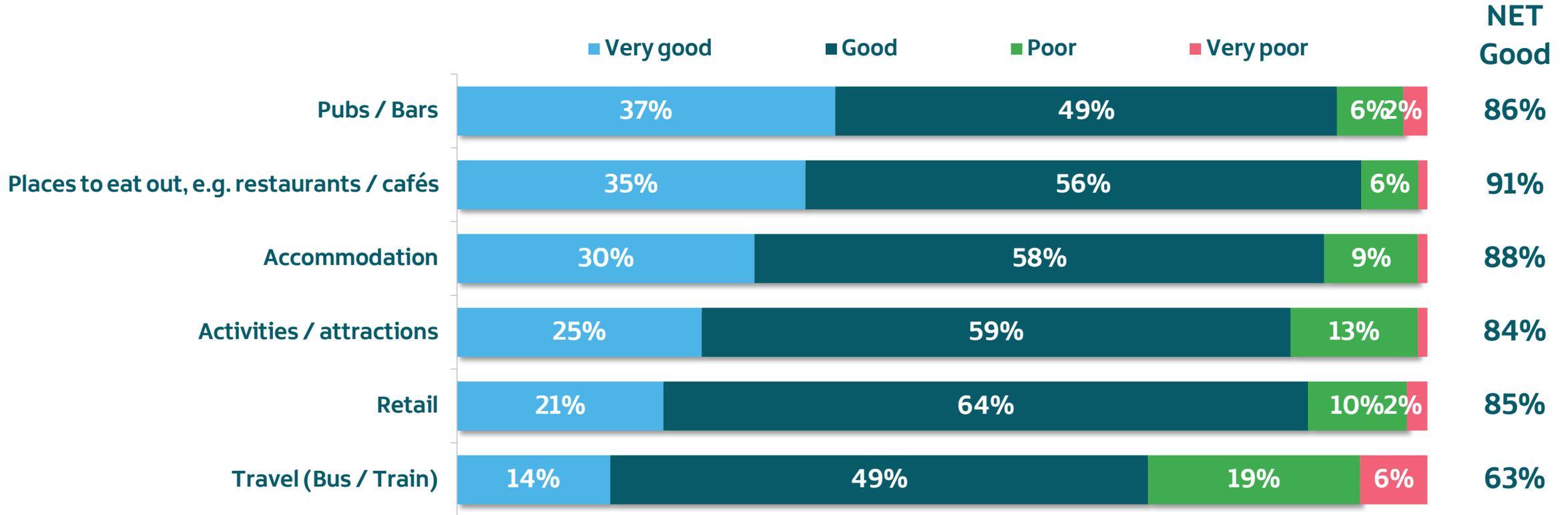
Some drops in satisfaction with welcome, range of things to see and do and events vs. W13

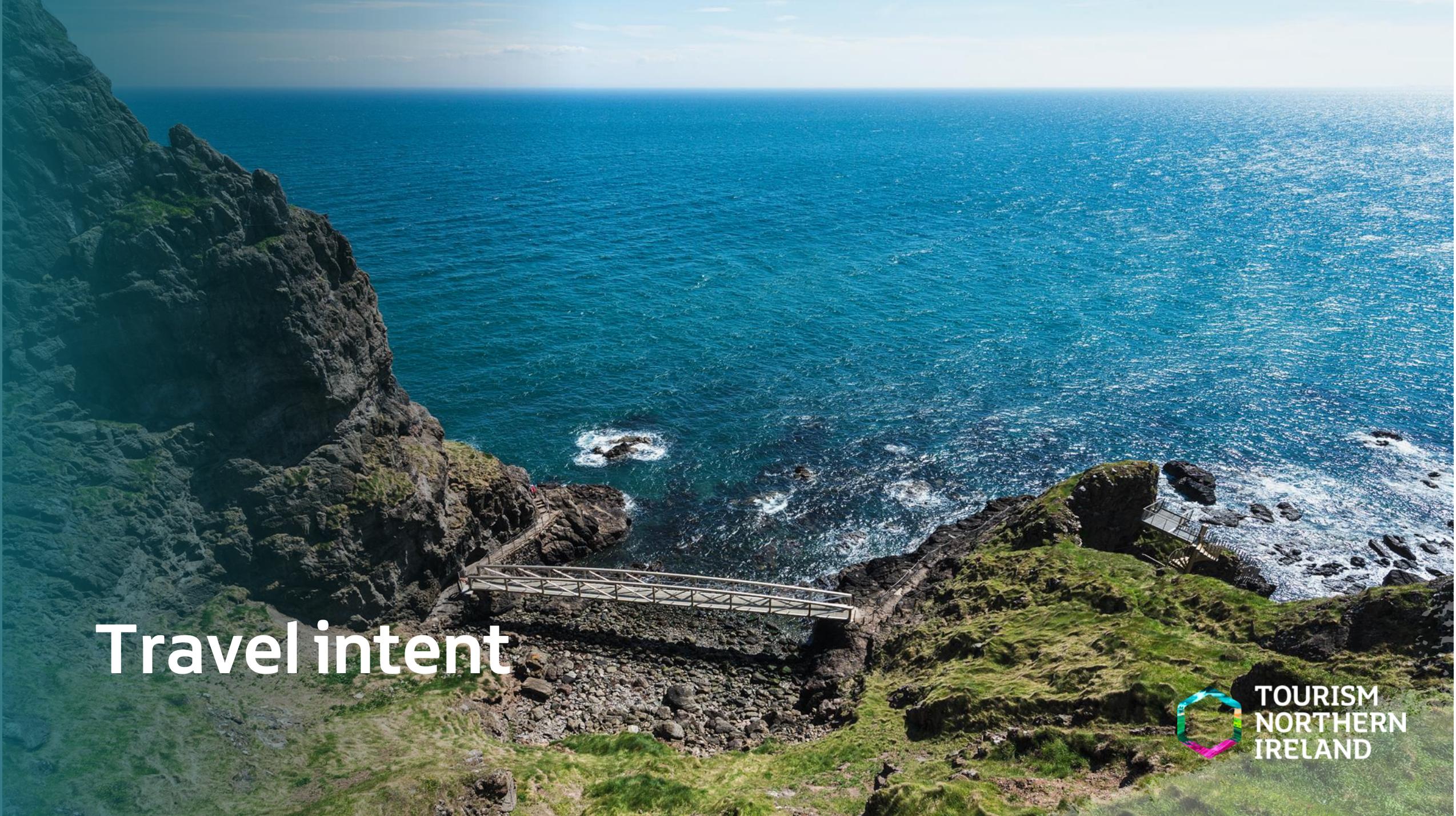
And on your recent trip(s) in NI, how would you rate the following...



Customer service scores are strong – especially in hospitality

How would you rate customer service in the following...?



An aerial photograph of a rugged coastline. A wooden walkway bridge spans across a rocky cove, connecting two landmasses. The water is a vibrant blue, and the rocks are dark and jagged. The sky is clear and blue. The overall scene is scenic and adventurous.

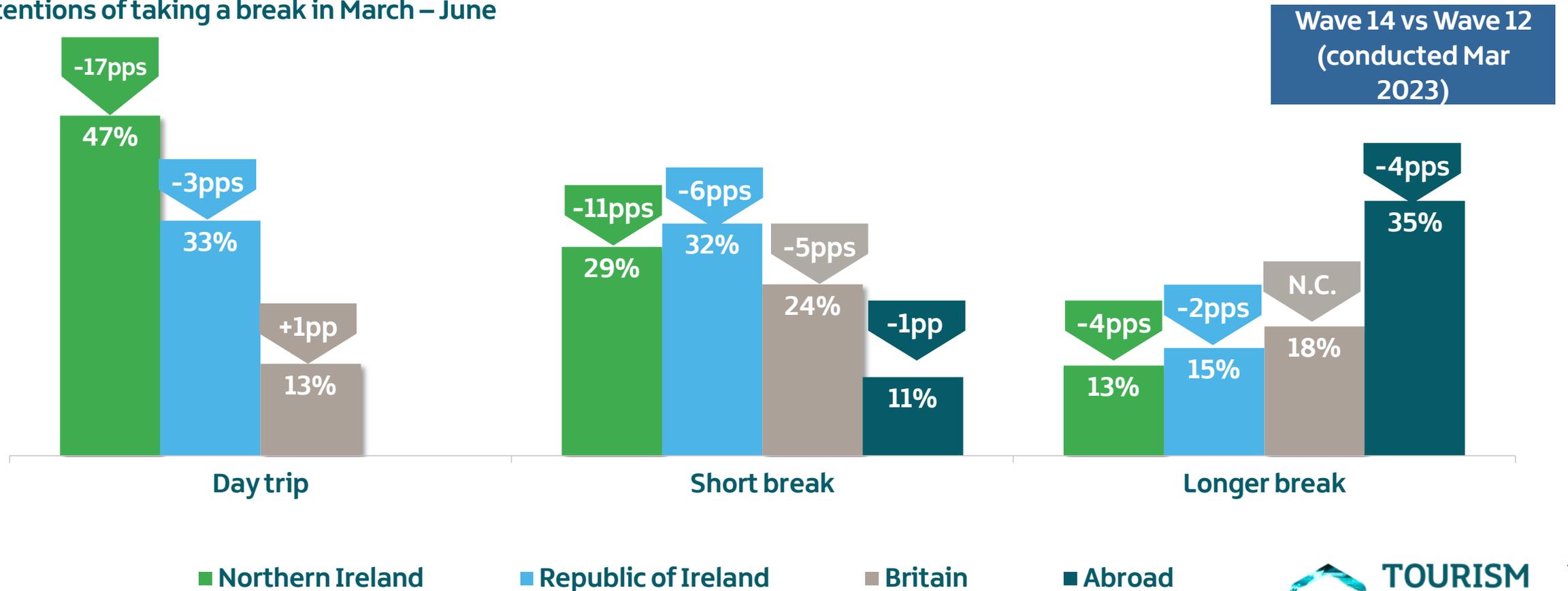
Travel intent



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Intention to travel this spring is down across the board compared to last year

Intentions of taking a break in March – June

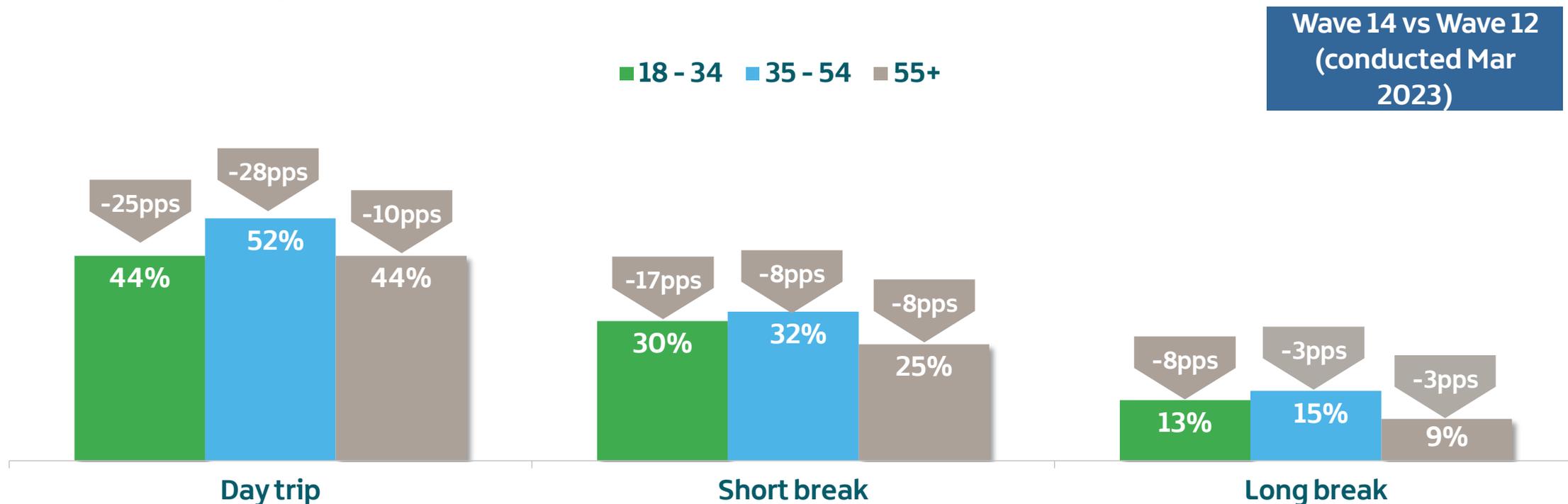


N = 400

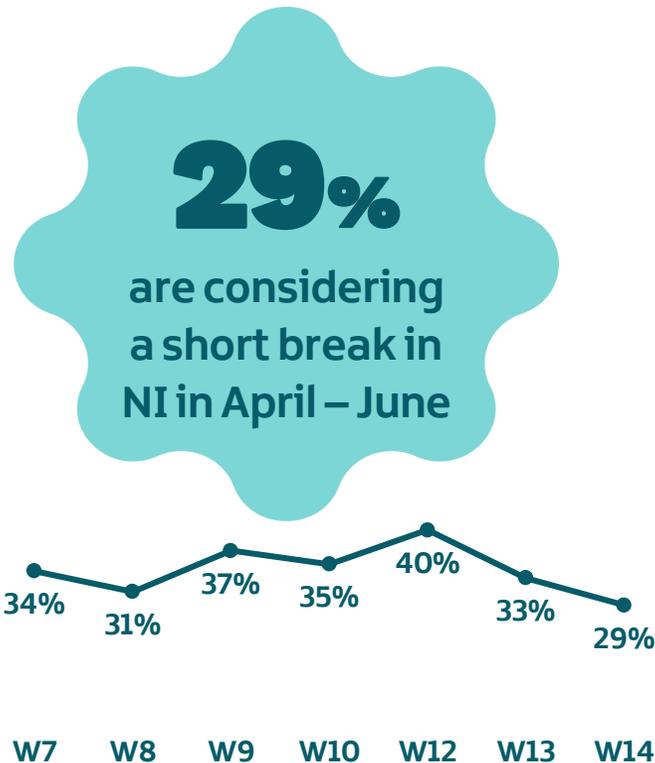
E1b. Would you consider taking a leisure day trip / short break of at least 1-3 night / longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the coming months (March to June)?

Day trip intentions hit in particular when compared to this time last year – especially among 35-54s

Trip intentions of taking a break in NI in March – June



3 in 10 planning short breaks - continues downward trend from W12 – but most are actively planning

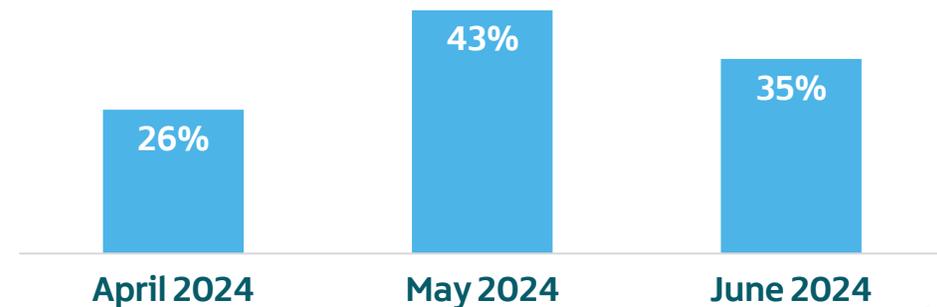


Status of short break – have they booked?



64% are actively planning or have booked a trip in NI – 19% of the total sample

Short break planned for



N = 400 / 116 considering short break / 74 planning a short break

E1b. 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 coming months (March to June)? / 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 trips do not decline as much in overall trend, but fewer have booked their trip outright. Trips skew later than short breaks

13%
are considering
a long break in
NI in April – June



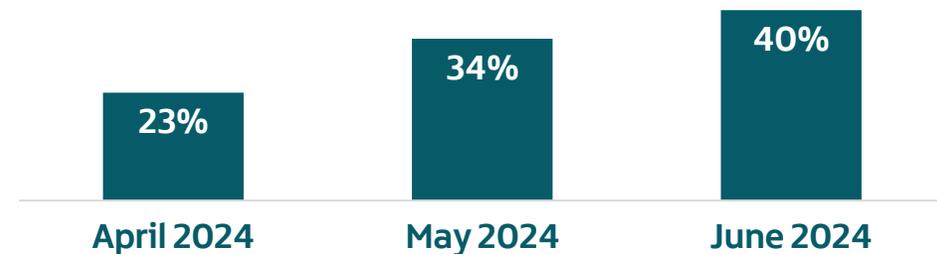
Status of long break – have they booked?

■ Booked ■ Actively planning ■ Intend to start planning later ■ May or may not plan



64% are actively planning or have booked a trip in NI – 8% of the total sample

Long break planned for

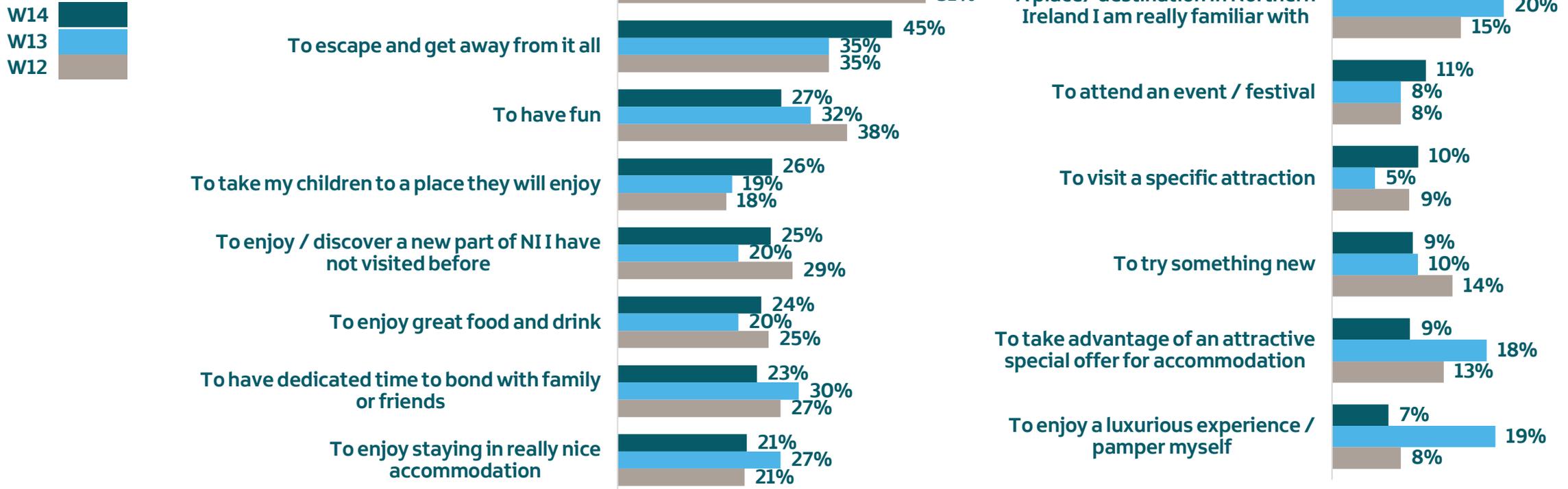


N = 400 / 52 considering long break / 33 planning long break (caution low N)

E1b. 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 coming months (March to June) / 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?

Increase in number mentioning escapism as a key motivation for travel

Trip motivations (long and short combined)



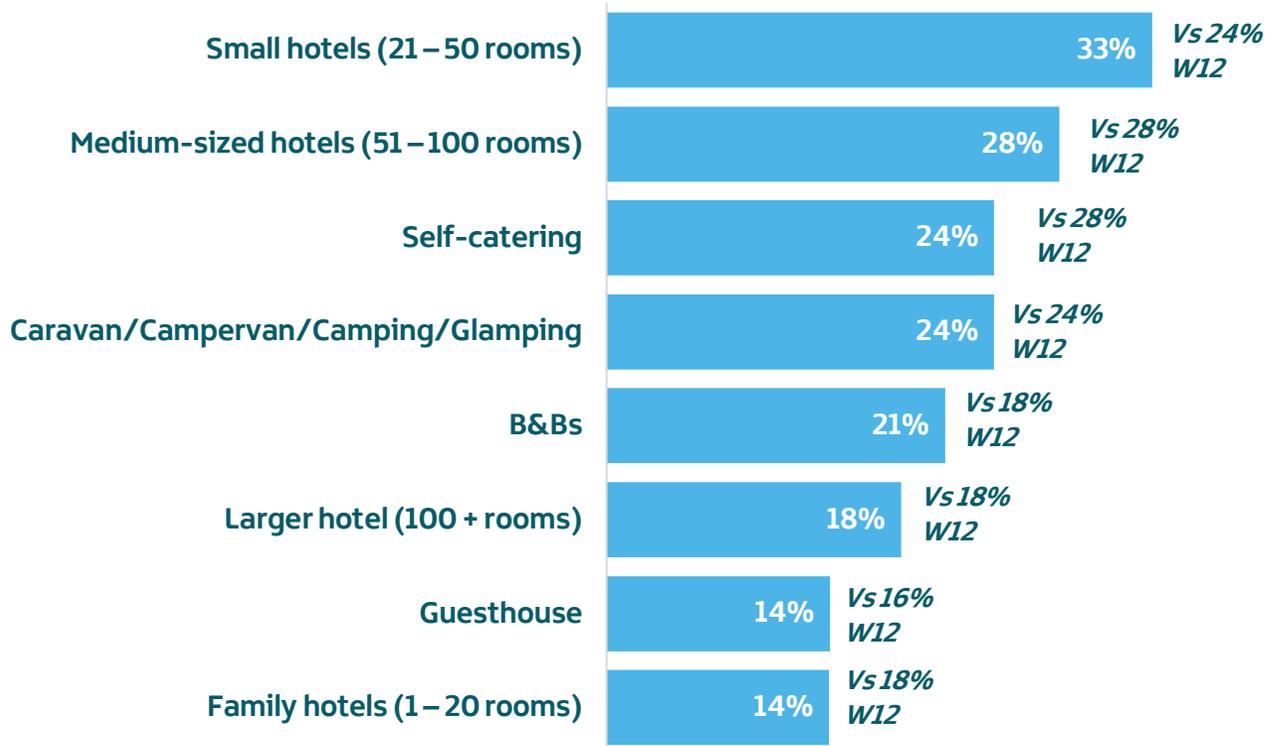
N = 107 planning long or short break (excl. "may or may not plan")

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

Preference for smaller hotels

Long & short breaks combined

Where staying (*showing 10% or higher*)



Who travelling with

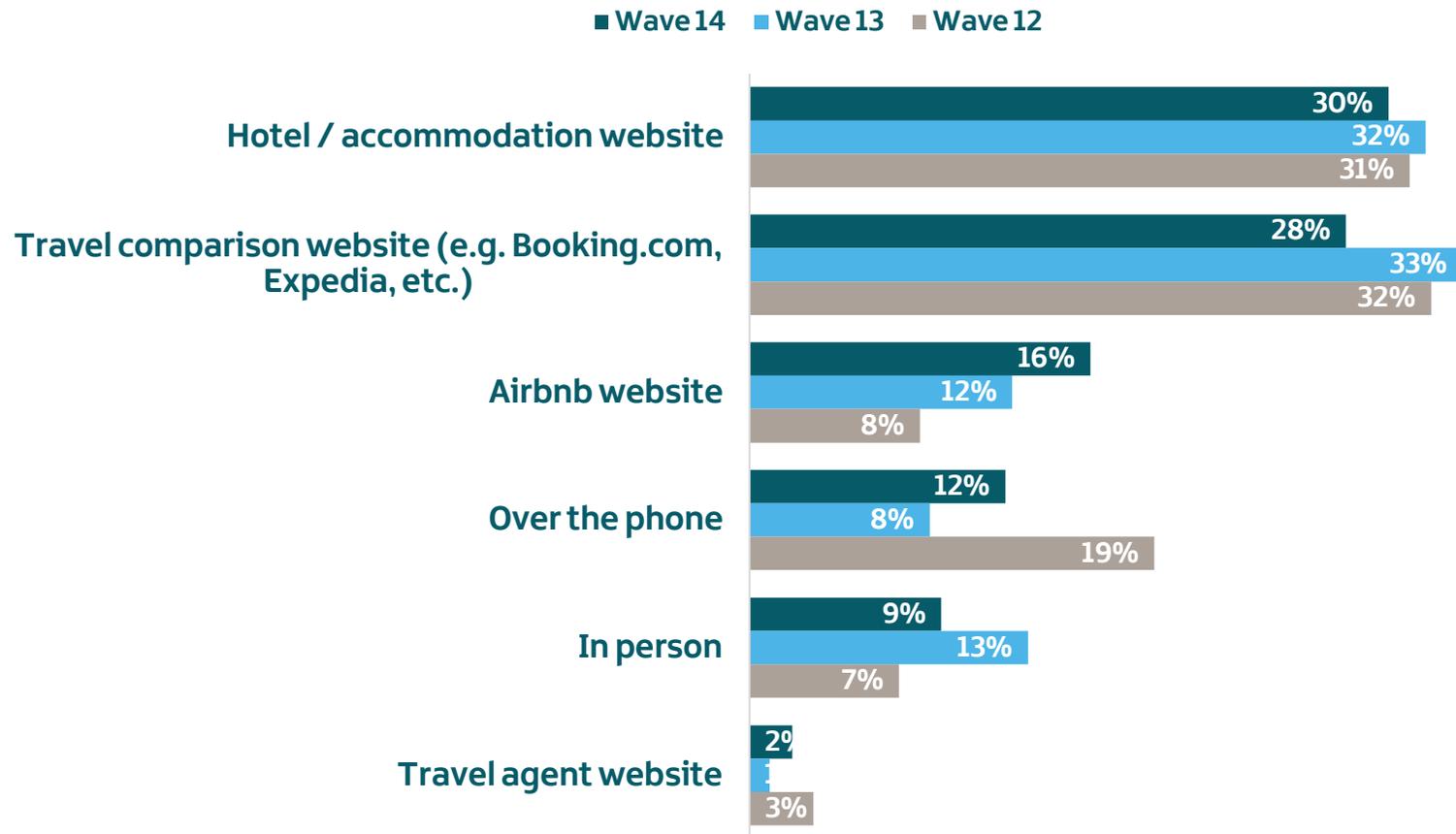


N = 107 planning long or short break (excl. "may or may not plan")

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?

Hotel and travel comparison websites still on top

How they plan to book their trip



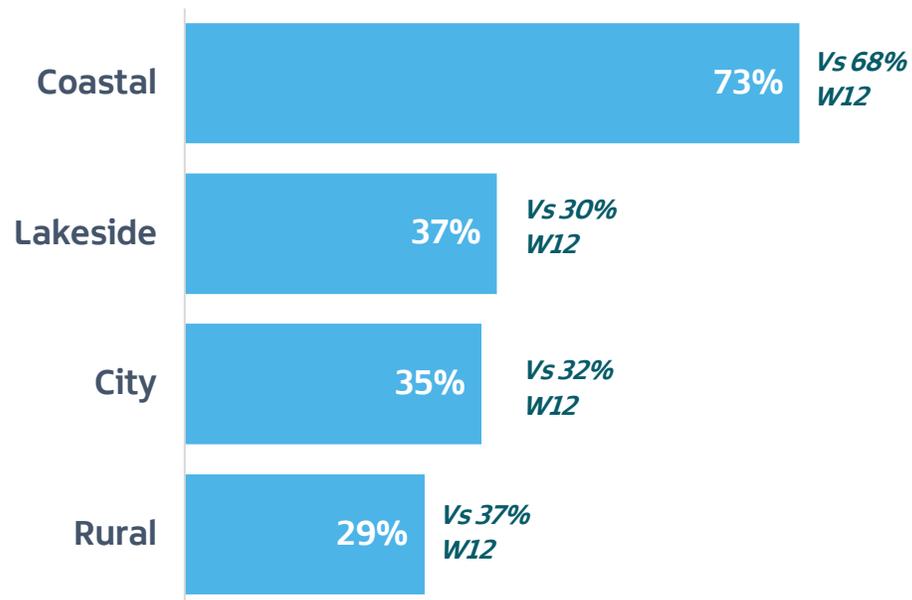
N = 107 planning long or short break
(excl. "may or may not plan")

E8. How do you plan to book your upcoming short or long break in Northern Ireland?

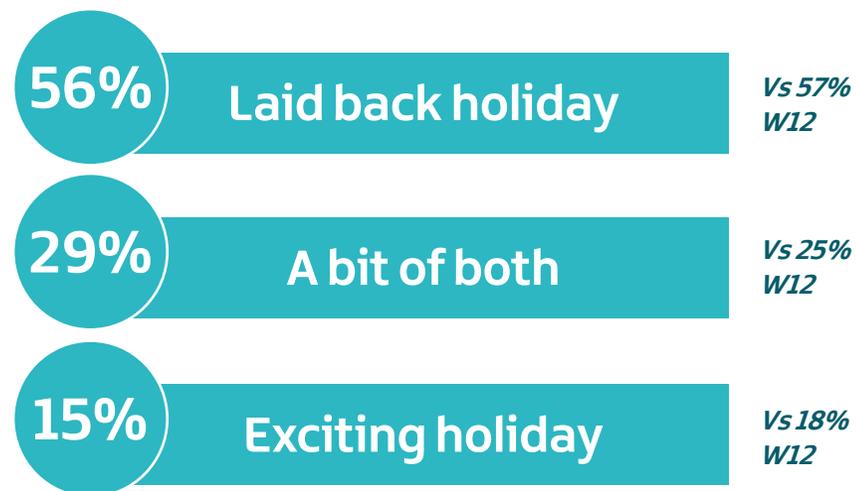


Coastal and lakeside breaks more popular this year – fewer looking for exciting holiday

Type of break preferred

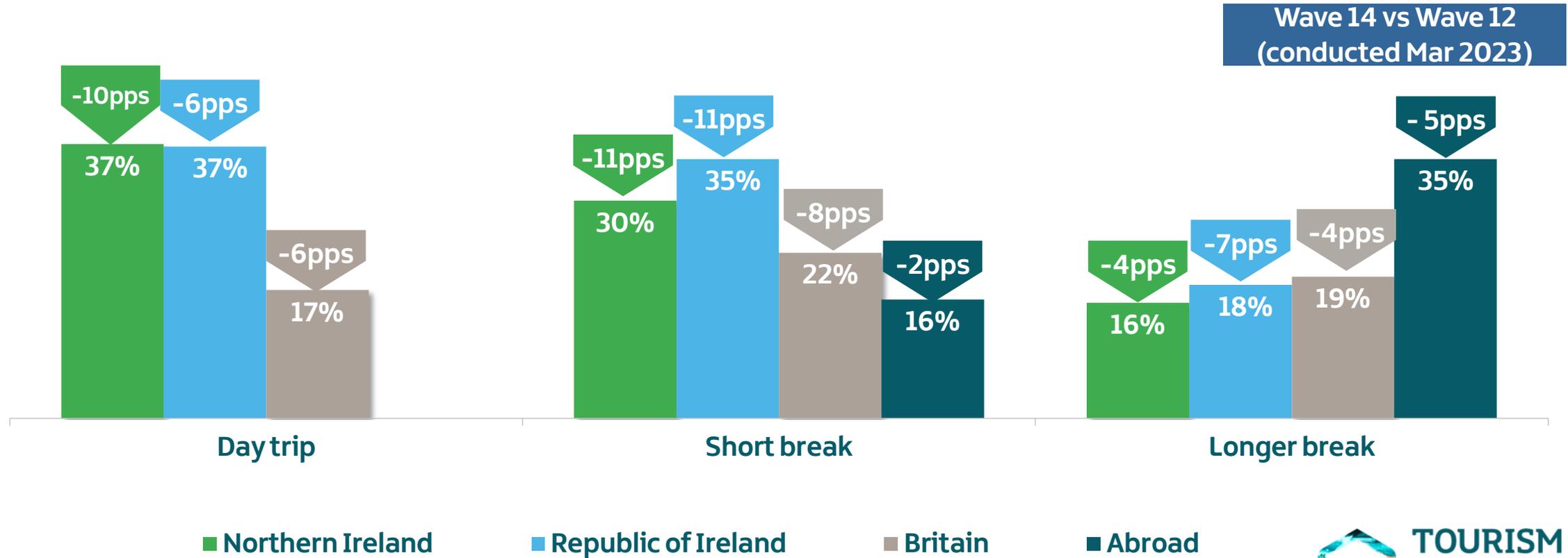


Type of trip preferred



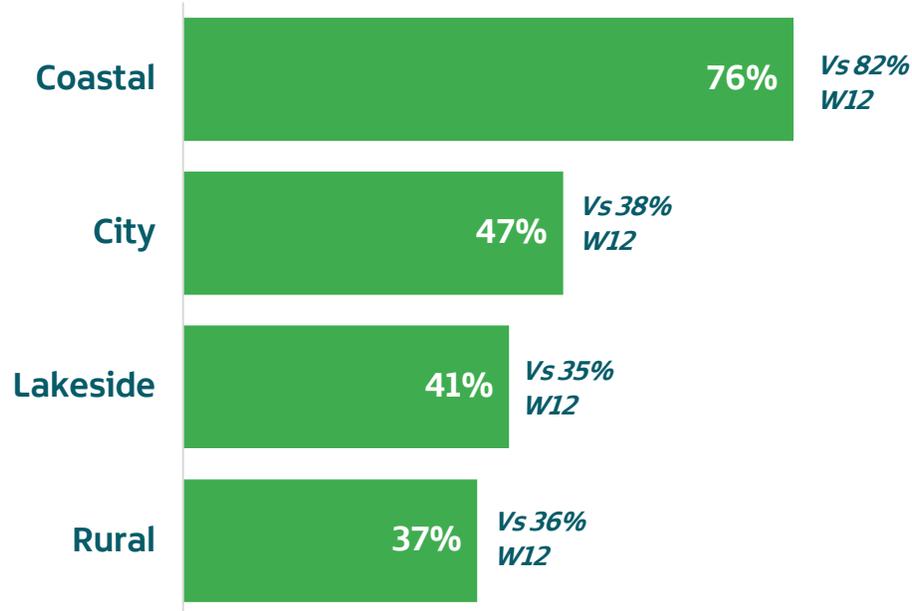
Decrease in trip intentions for summer, but less so for longer breaks

Intentions of taking a break in summer

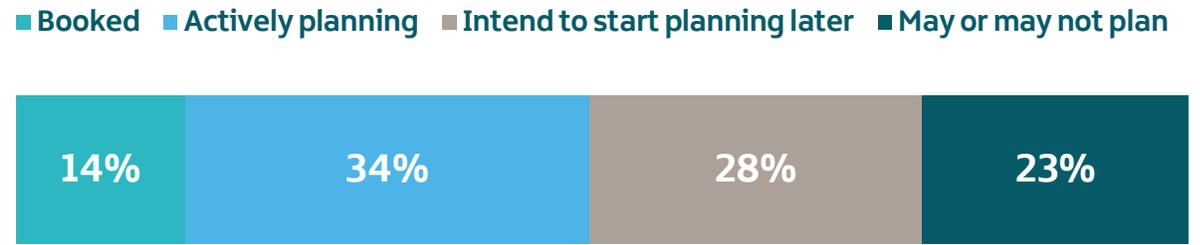


Around half of those considering a NI summer break have booked or are actively planning

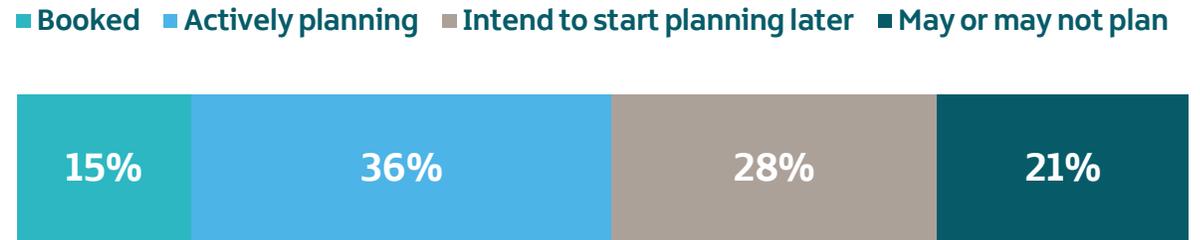
Type of break considered



Amount of short break planned



Amount of long break planned



Slight decrease in those considering a break abroad, July being the most popular month to go away

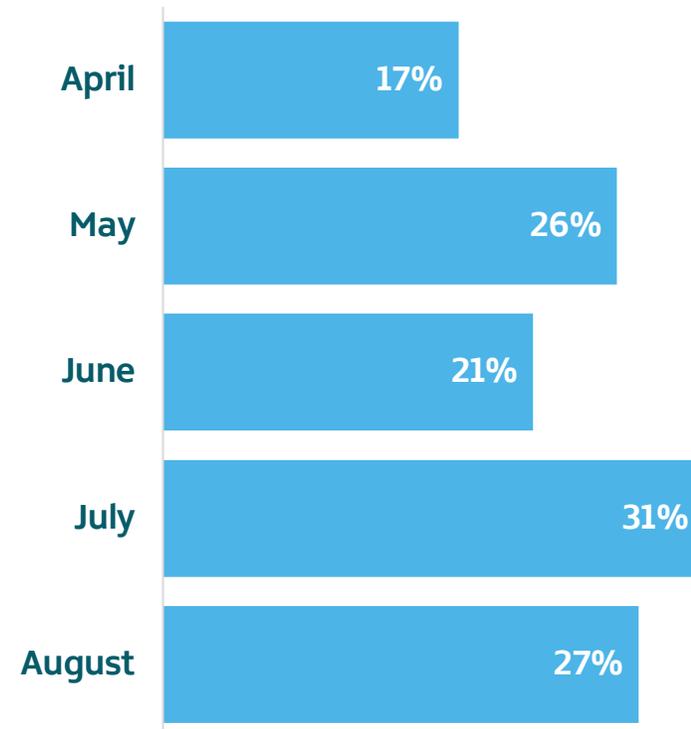
48%

of total sample are considering a break abroad in the next 6 months
(vs. 52% W12)

67%

of this cohort are actively planning or have booked their trips
(vs. 67% W12)

When trips abroad are planned for

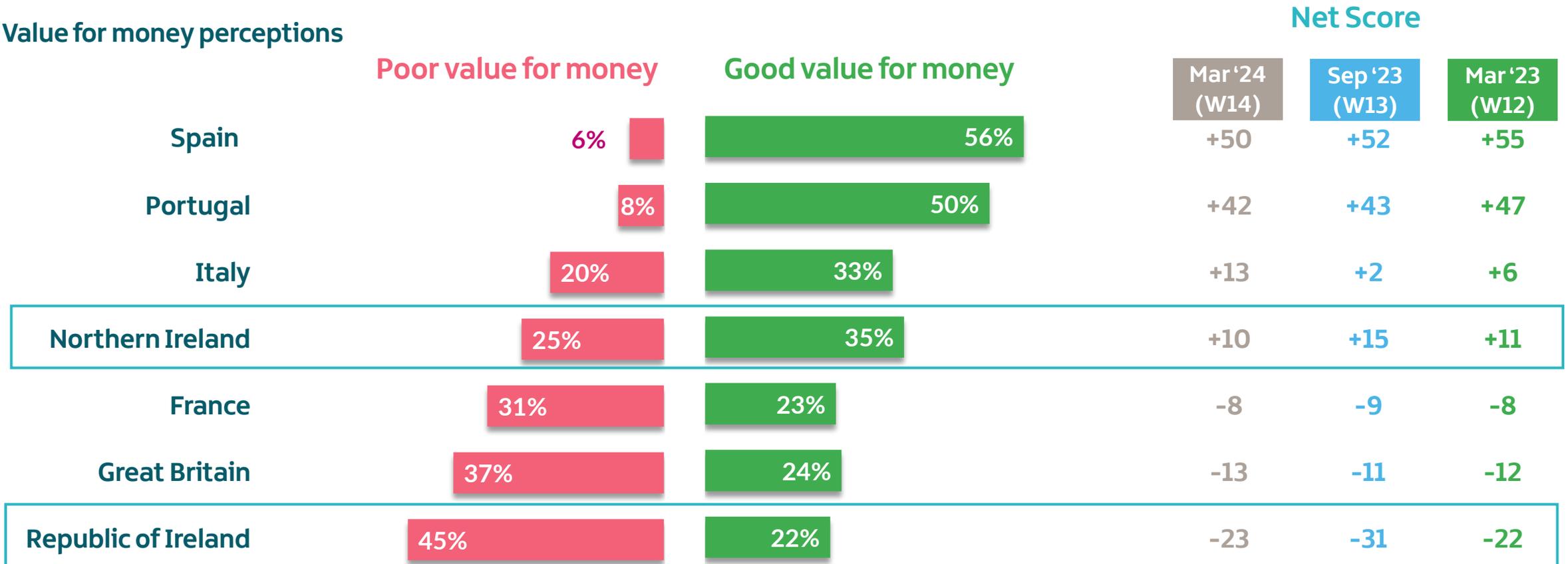




Value for money

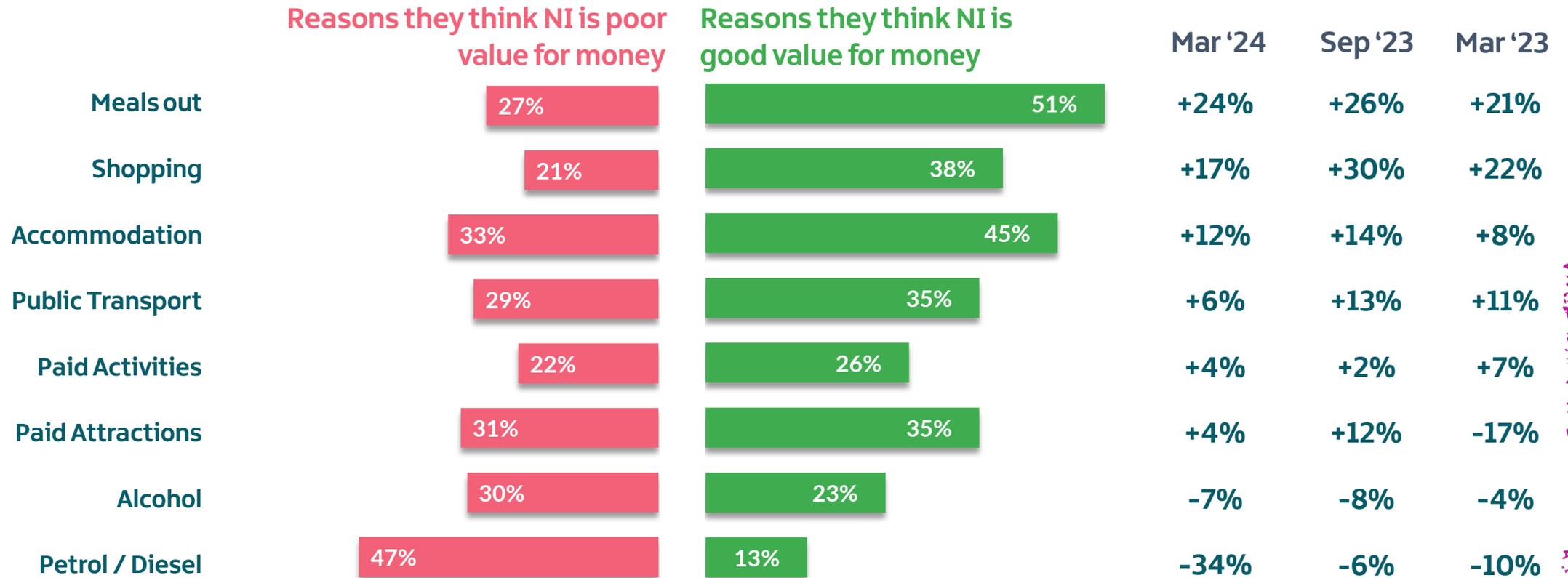
NI maintains enhanced VFM reputation over ROI and GB but drops back slightly

Value for money perceptions



Positive VFM perceptions for meals out, accommodation and shopping, but some declines compared to last wave evident

Why they think NI is poor or good value for money as a holiday or short break destination





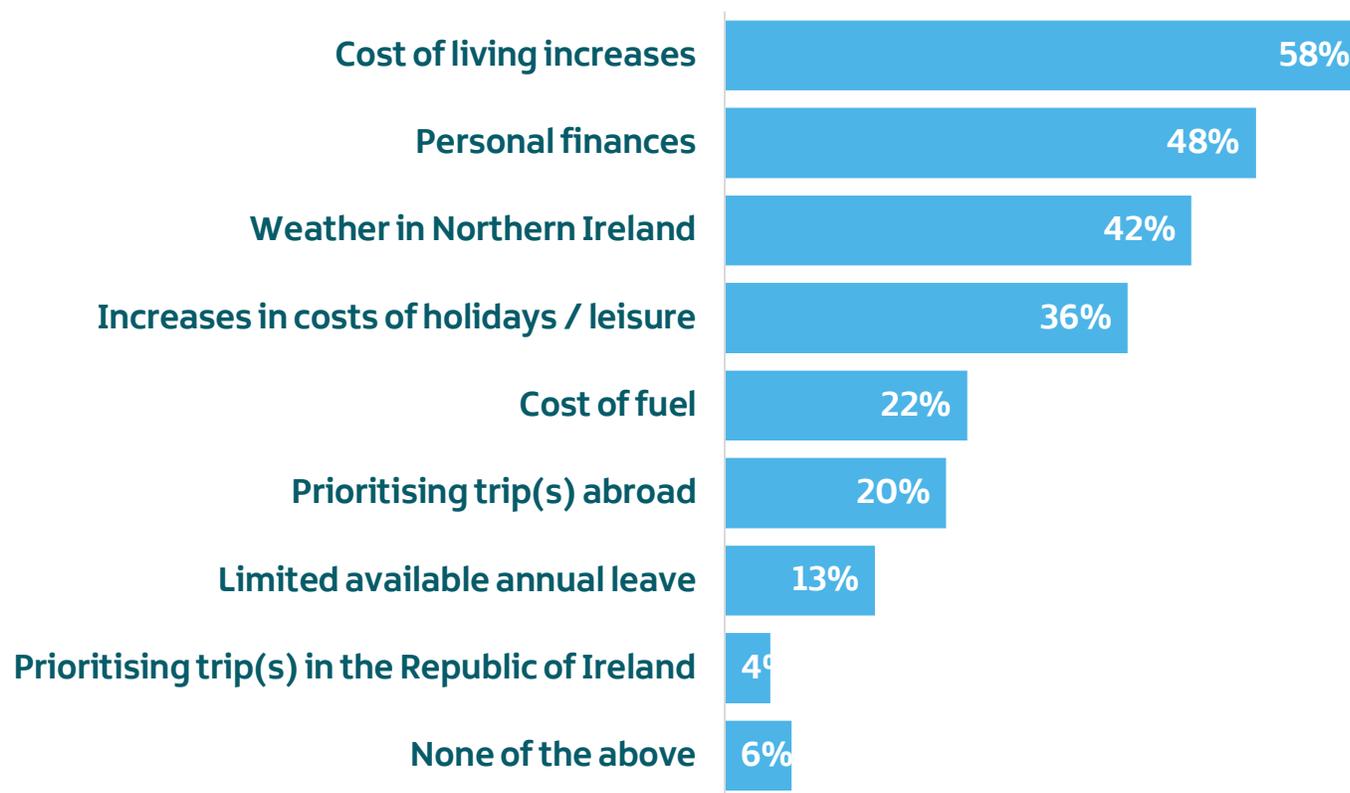
Cost of living



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Cost of living mentioned by more than half as a barrier to travelling in NI

What could stop them taking a break in NI



18-34s more likely to mention cost of living increases (65%) and personal finances (58%)

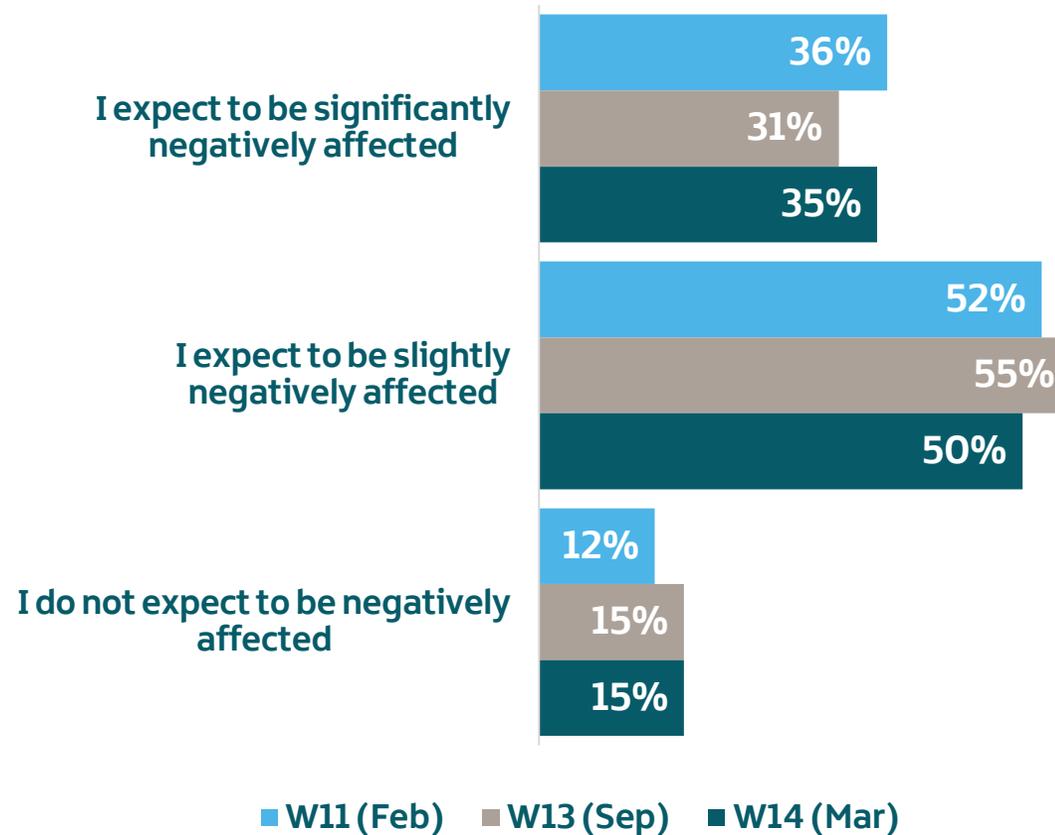
C2DE also more likely to mention cost of living increases (65%)



Slight increase in the number expecting to be “significantly” affected by cost-of-living increases

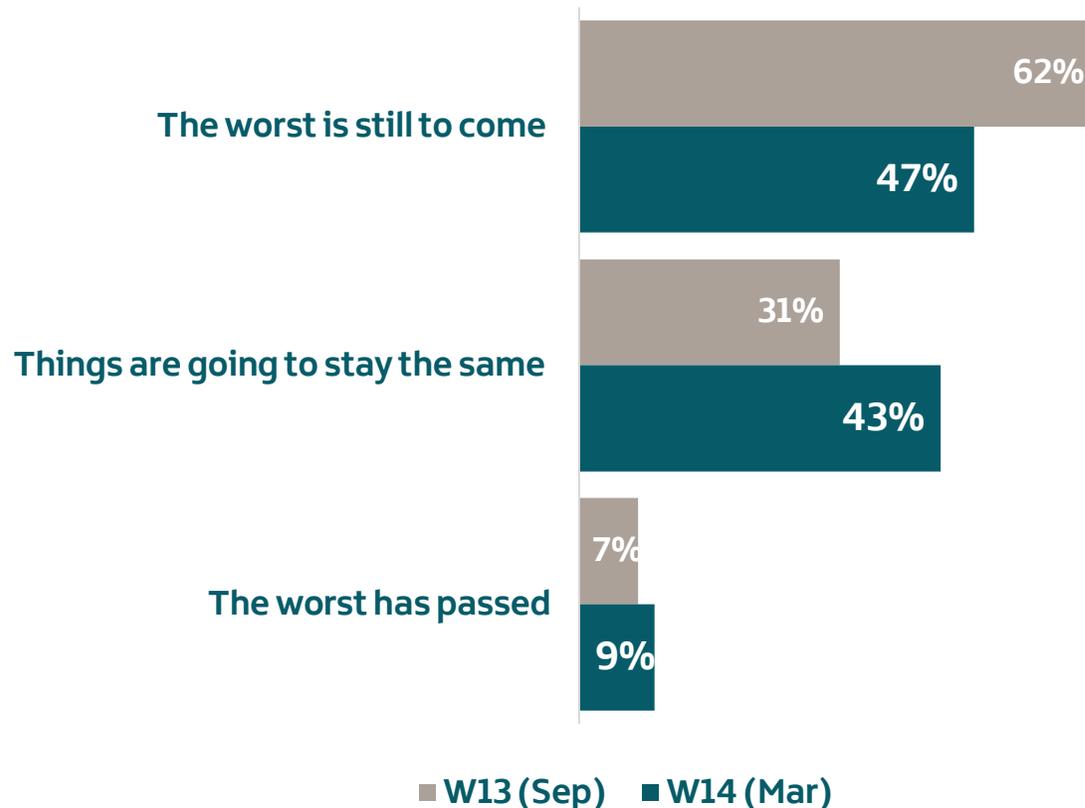
Extent to which people feel they will be financially affected by cost-of-living increases in coming months

85%
expect to be affected by cost-of-living increases



However, we do see less negativity around the coming months, with fewer people saying the worst is still to come

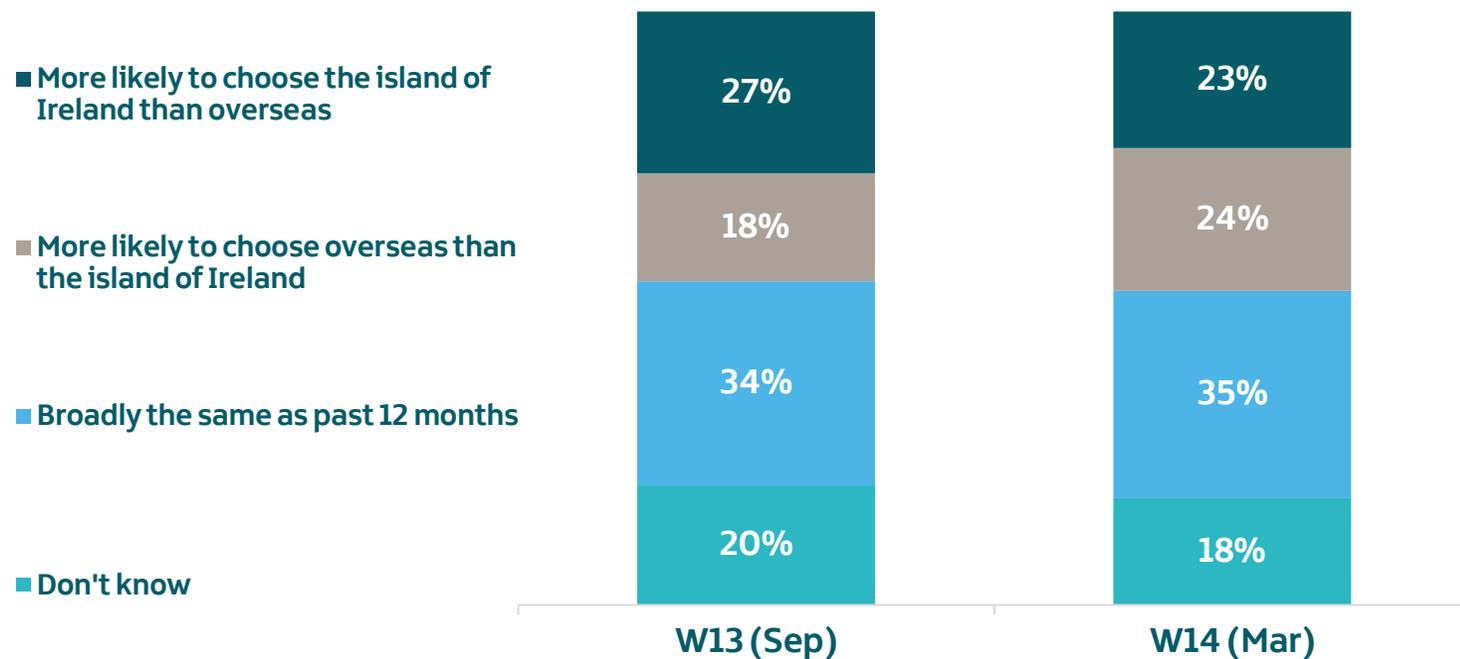
How the cost-of-living situation will change in next few months



Women more likely to say they think the worst is still to come (53%) as are C2DE (52%) and pre-family (59%)

Number saying they would choose a trip overseas over IoI has increased – although young families still picking IoI

How people expect their short breaks/holidays in the next 12 months to compare to the last 12 months

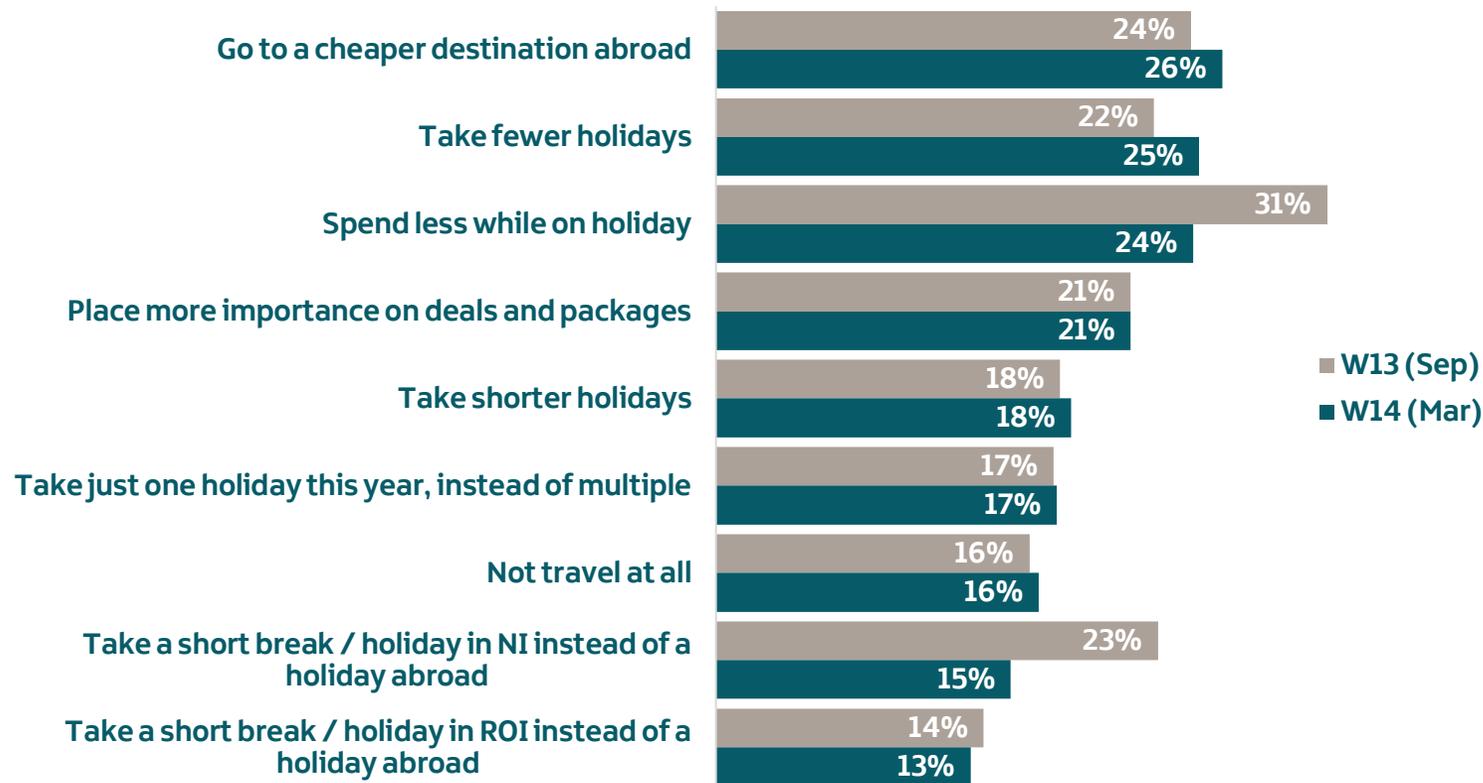


Young family lifestage (42%) and Aspiring Families segment (31%) significantly more likely to pick IoI



More desire to take cheap trips abroad / take fewer holidays – drop in number who will stay in NI for a trip

Things people are more likely to do in relation to short breaks/holidays compared to this time last year



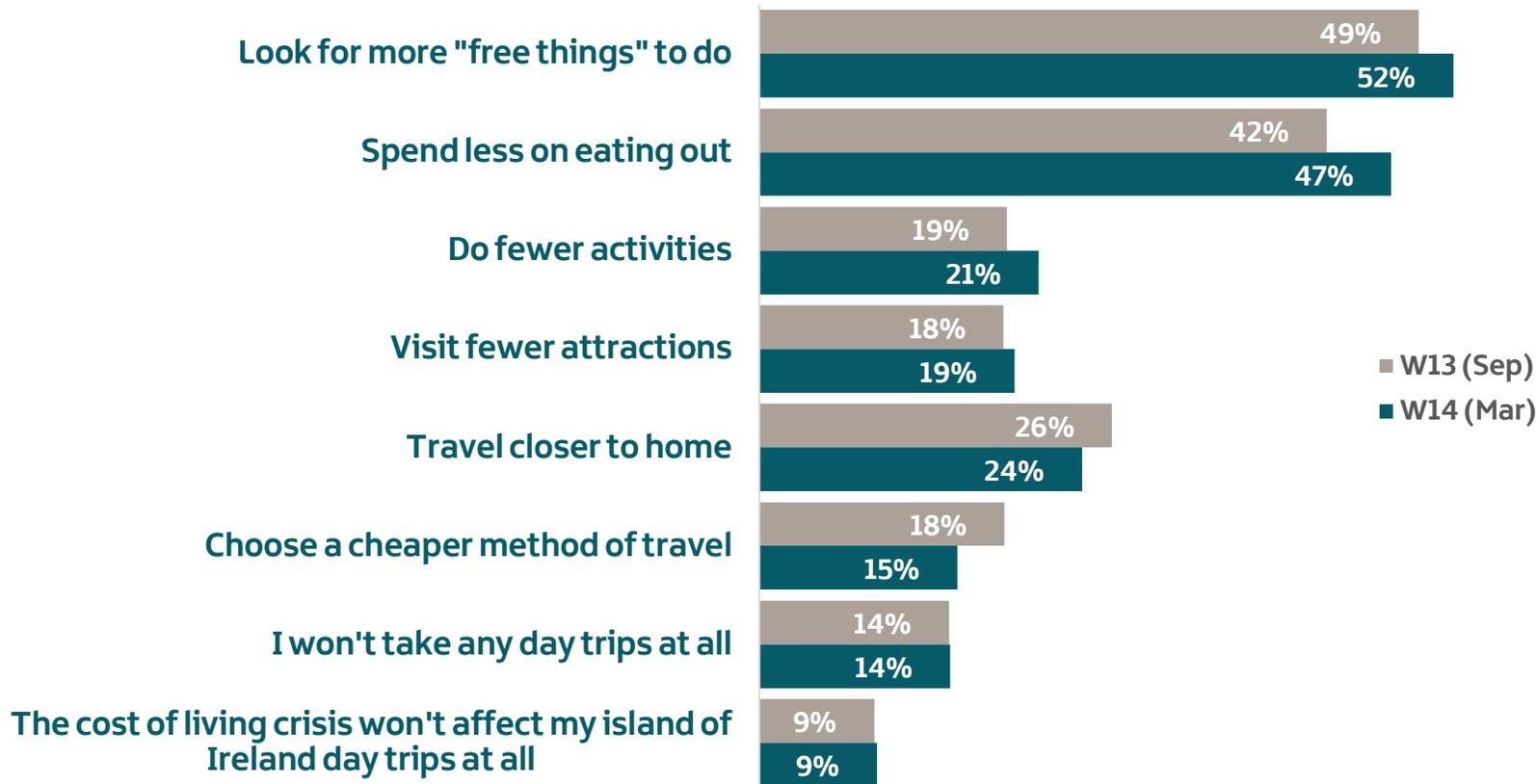
18-34s are more likely to say they'll take a cheaper trip abroad (34%) or spend less while on holiday (34%)

Older Family lifestage more likely to place more importance on deals (30%)



Spending less on eating out is becoming a popular choice for those taking day trips in NI

Things people consider doing as a result of cost-of-living crisis when taking a day trip in NI



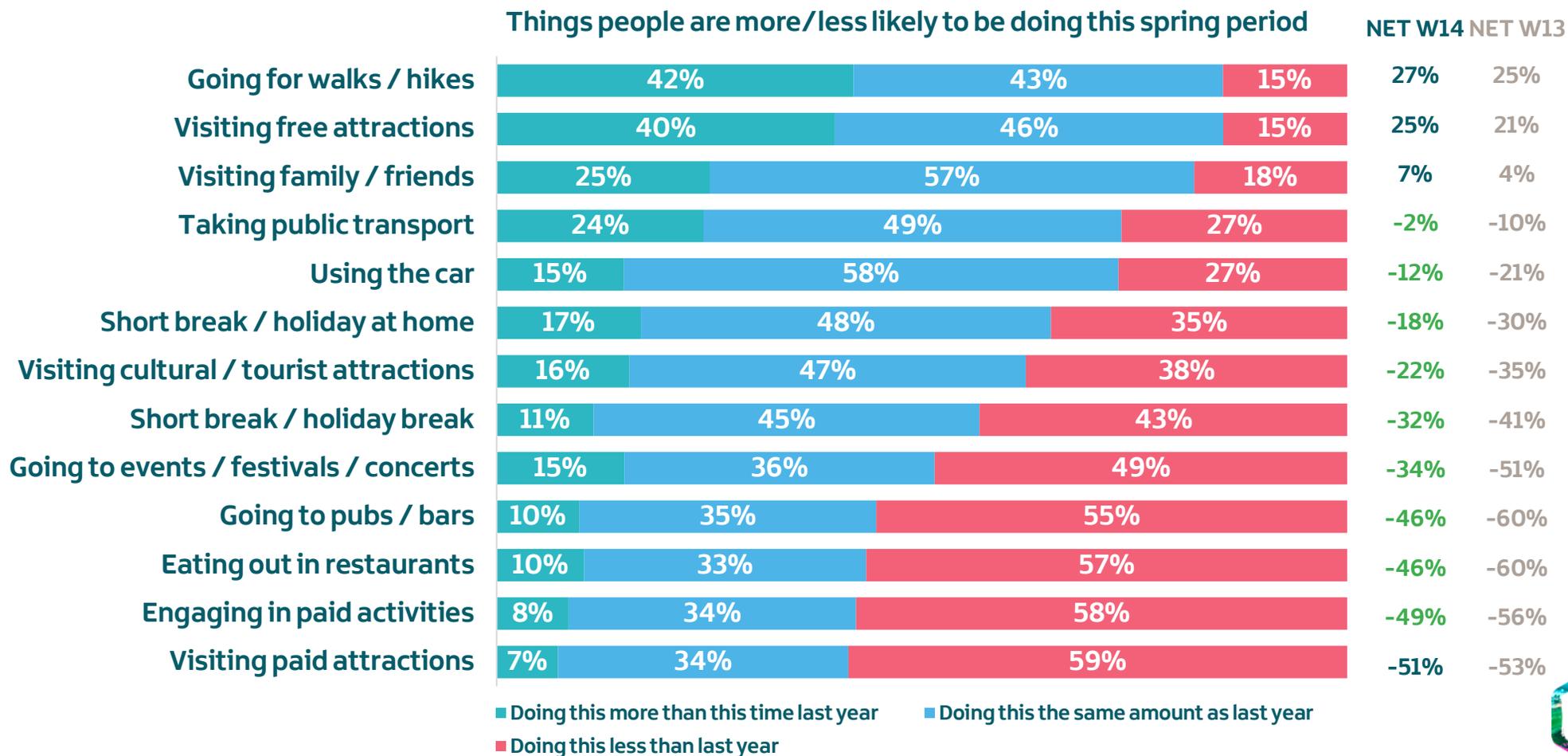
Aspiring Families lifestage more likely to look for "free" things (60%)

Those planning trips within NI more likely to spend less on eating out (56%), as are Young Family lifestage (63%)

18-34s more likely to choose a cheaper transport method (21%)



While most people still saying they are going to be reducing paid activities / attractions and eating out, this has improved vs. Sept



Net scores significantly improve vs. Sept – 5pp+ net increases shown in light green



- Finnish
- French
- Italian
- Japanese
- Korean
- Polish
- Romanian
- Russian
- Spanish
- Ukrainian

Finding Seamus Heaney in other languages

Translations

A selection of texts translated by Seamus Heaney



Limited and Special Editions



Just a small selection of the many limited and special editions published

'And hope and history rhyme'



4 prose collections

Scaffolding



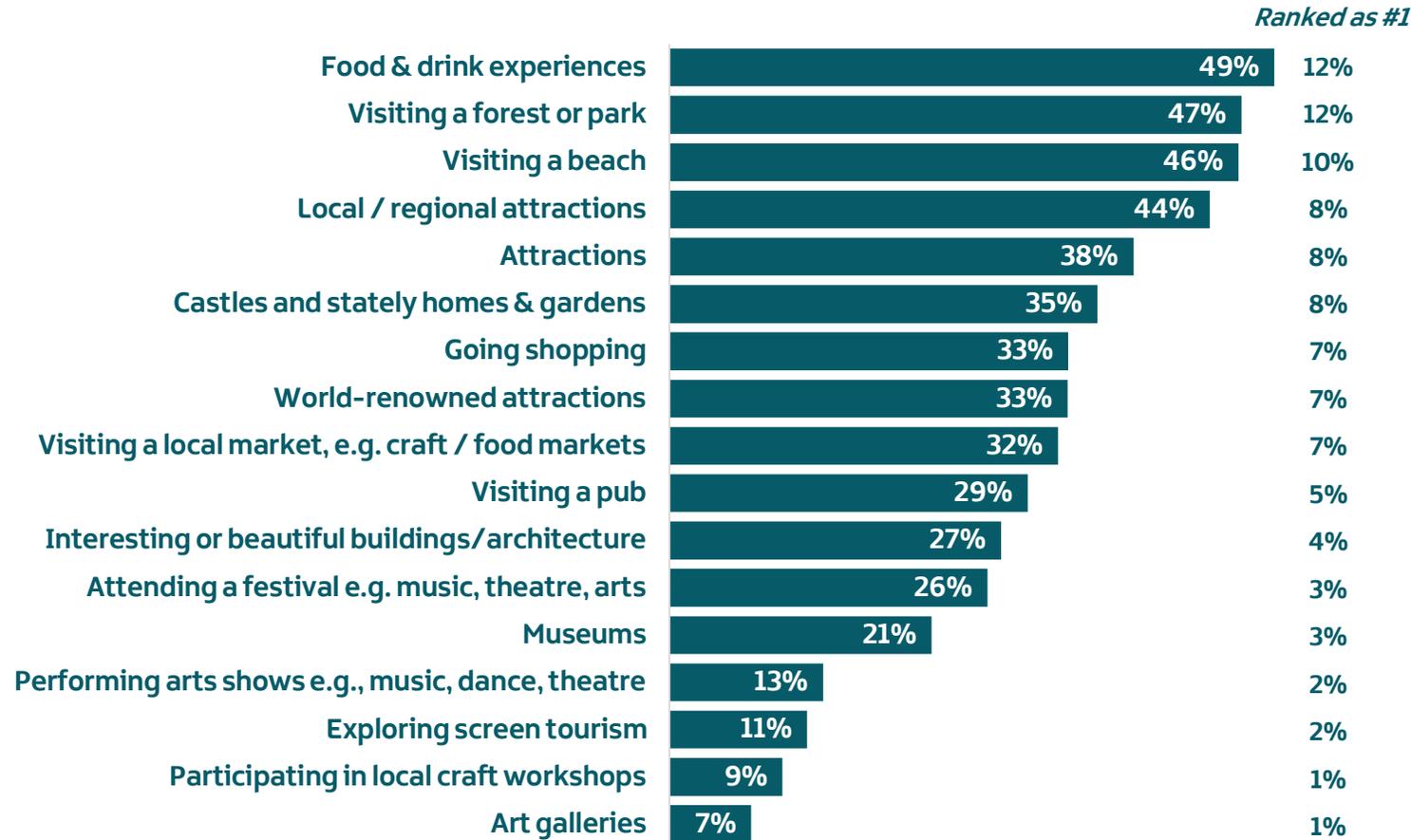
A Global Poet



Arts & Culture

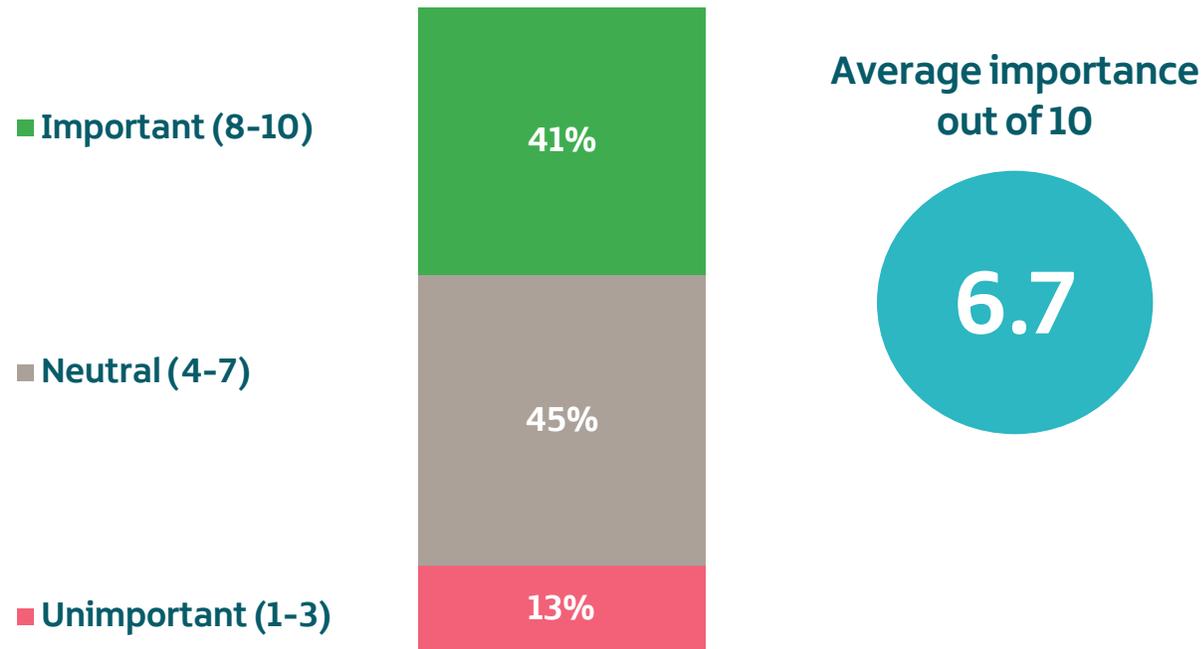
Food & drink & outdoor experiences top rated by those in NI – cultural activities also attract interest

Types of attractions they'd be most interested in visiting in NI during a short break – ranked in top 5



Considerable level of importance for arts and culture – especially with younger people and those planning trips

How important is availability of arts/ cultural events when considering a visit in NI?



More likely to say culture / arts is important:

- 18-34s (50%)
- Pre-Family (52%)
- Those planning a trip in NI (62%)
- Social Instagrammers (61%)

2 in 3 see events/ festivals as important to find out about, although attractions/ accommodation a top priority

How important is to find out more about the following before visiting NI?





Summary



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Summary

Visitor volumes reduced, but experience still positive

- Findings suggest a slight decrease in short breaks taken in NI during Jan-March 2024 for both markets, and for domestic NI day trips, compared to when this research was conducted last year.
- For those consumers in both markets who have taken a break in NI since the start of 2024, the vast majority said their trip matched or exceeded expectations, with the range of places to eat & drink and the welcome & hospitality being particularly highly rated.

Intentions drop

- In relation to outlook for the next few months and looking ahead to the summer months, a softening in demand for travel to/within NI from the NI and ROI markets is evident.
- However, this reduced appetite for travel is present across the board, with short break intentions for ROI, GB and abroad also reducing for consumers in both markets.

NI still rated as offering good VFM

- Overall, consumers in both markets continue to rate NI as a better value for money tourism destination than ROI and GB. NI is widely perceived as offering good VFM across the tourism offer, particularly for meals/eating out, accommodation and shopping.

Cost of living increases continue to impact consumers

- Cost of living increases was rated as a top barrier for taking a trip to NI over the next 6 months by NI consumers, with around half in choosing this as a barrier. Personal finances was the second rated barrier for consumers.
- When considering NI day trips, around half said they would look for more free things to do. There is also an increase in the number saying they will spend less on eating out.