

Tourism Northern Ireland
Consumer Sentiment Research
ROI Market – wave 14

April 2024





Research background



Research background & objectives

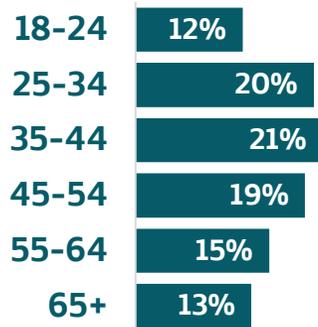
This is the 14th wave of consumer sentiment research in the Republic of Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere.

Objectives:

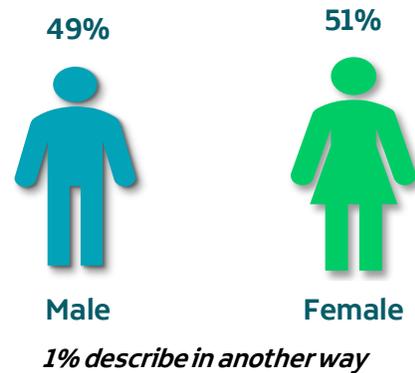
- Understand recent travel experiences to NI.
- Assess current attitudes towards travel in NI, ROI and further afield.
- Understand what impact cost of living increases and other broader factors are having on the above.

Sample - We spoke to a robust, nationally representative sample in the Republic of Ireland

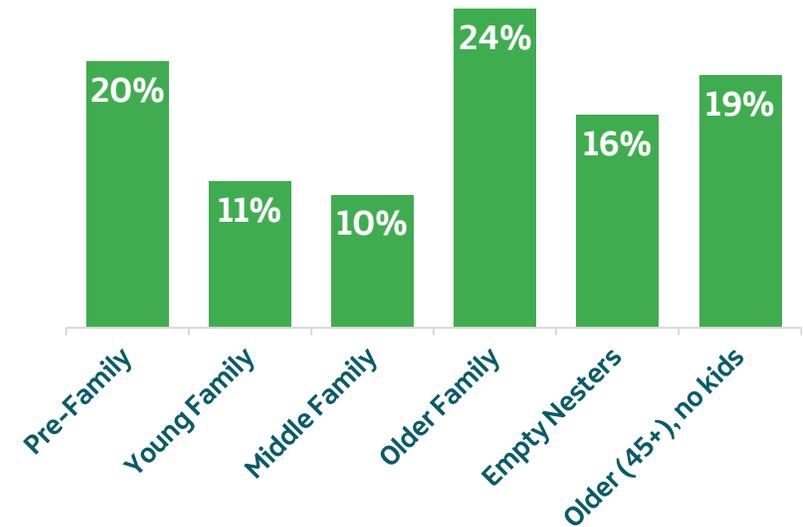
Age



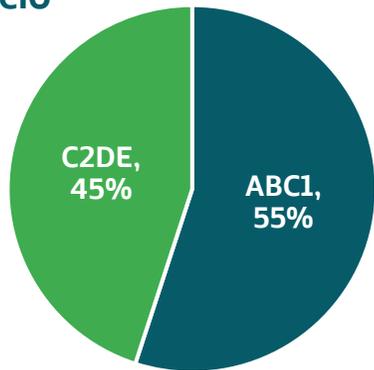
Gender



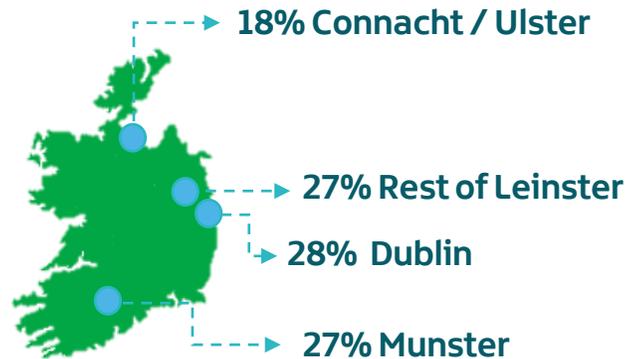
Lifestage



Socio



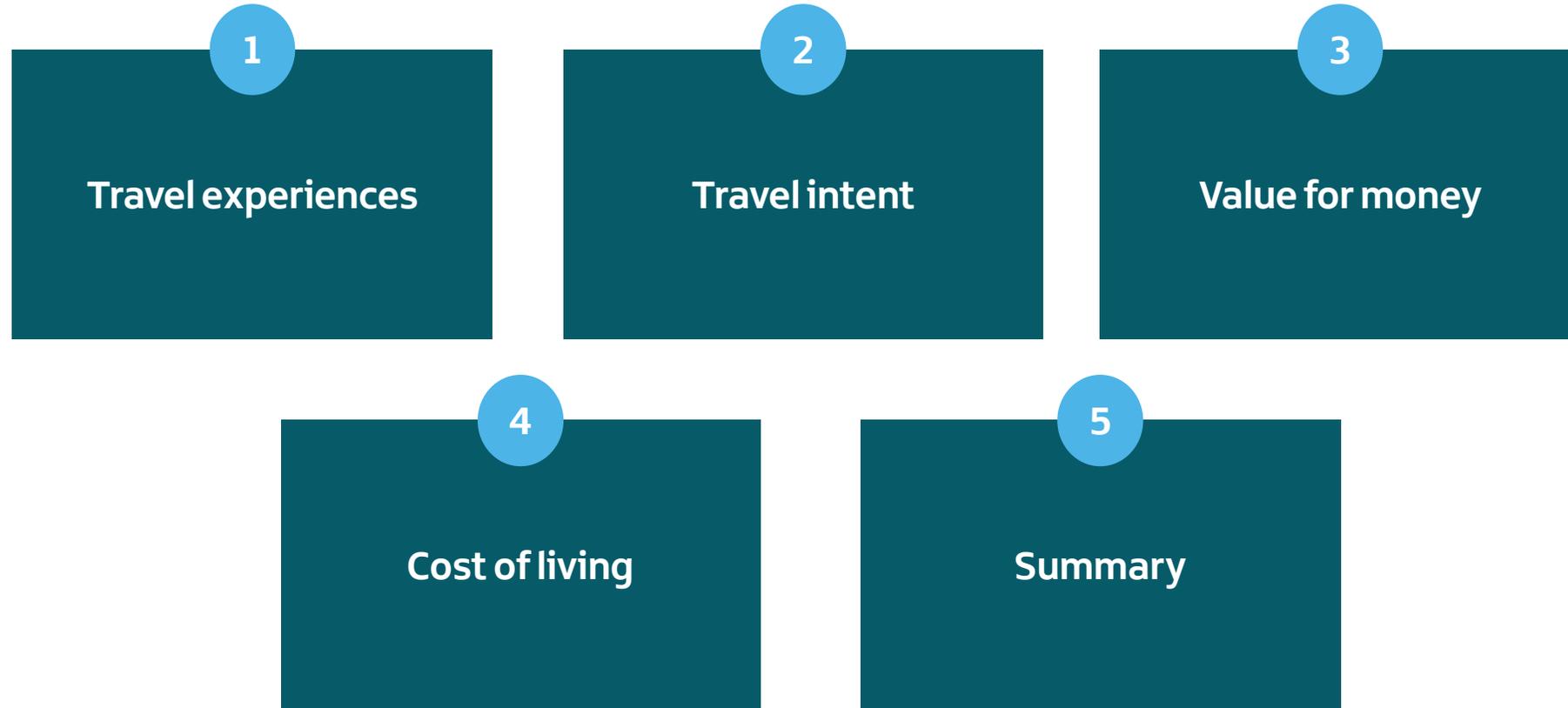
Region



**Total sample – 750
ROI consumers**



Contents





Travel experiences

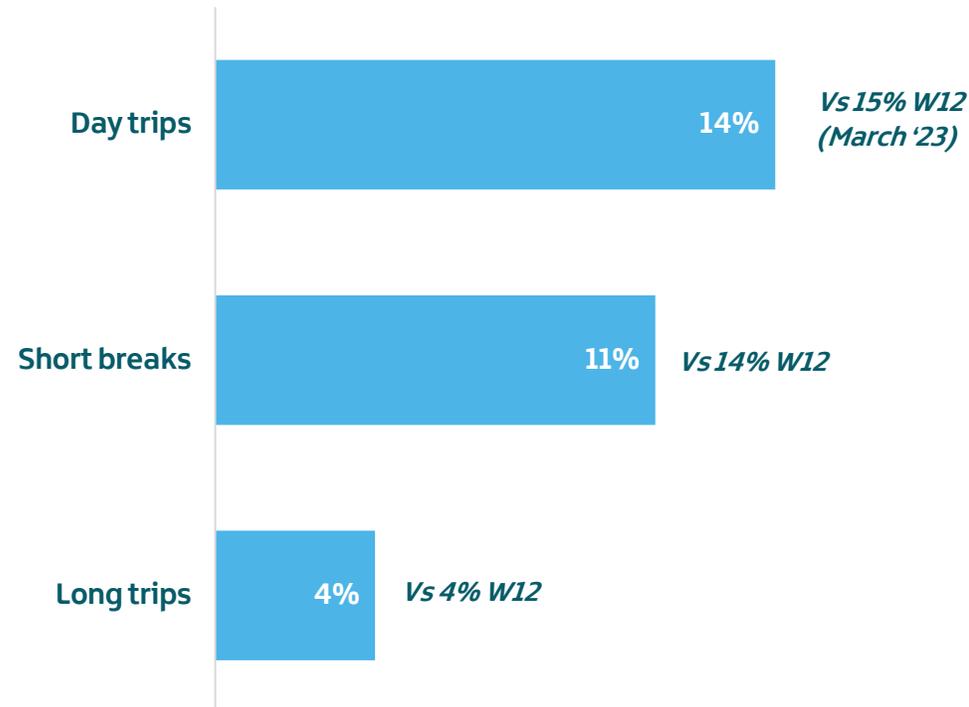


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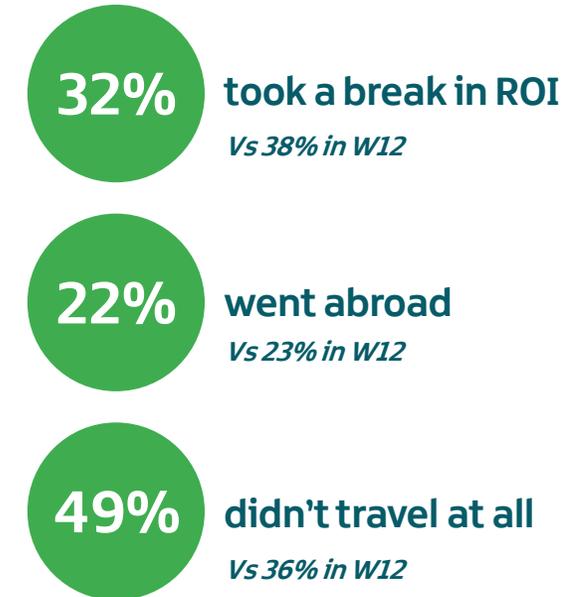
Slight drop in number who've travelled to NI this year vs. last year, with increase in number who haven't taken any trips

13%
have taken a short or long break to NI in 2024

% of total sample who took a trip to NI



Other than NI...



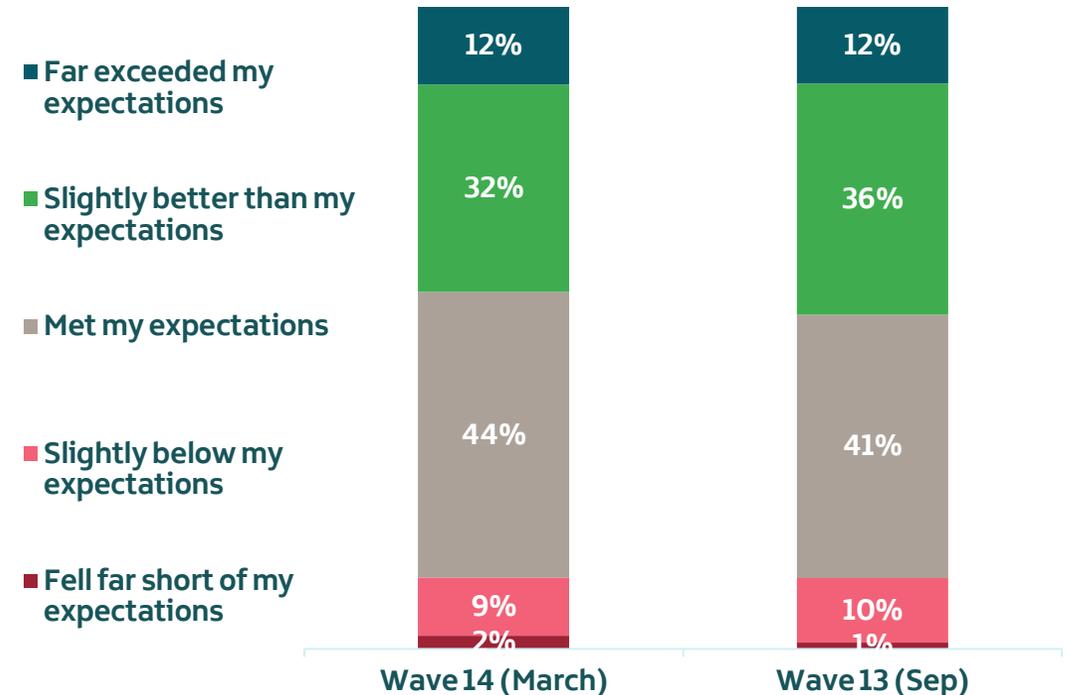
Encouraging to see that expectations are still very much being met or exceeded

88%

had their expectations met or exceeded

Vs 89% in Wave 13 (September)

Those who visited NI felt their trip...



Top comments around what they would recommend focus on the welcome, and quality / range of things to do

People

People are genuinely friendly lovers of their own land and proud to show it to their visitors

The overall feeling when we've been somewhere is that the people are as excited to see you as you are to see the place visited

The biggest reason I enjoyed this trip was because of the people I met and the views I saw

I loved it, so much things to do and see the food and bars are amazing- great craic and hospitality

Accommodation & food and drink – quality and value

The hotel was brilliant for the price we paid. The staff at the hotel were amazing

I booked a house for a weekend in Newry through booking com.it was spacy clean warm and had all mod cons for £140 for four adults

Accommodation was good value for money and plenty of choice. Very good places to eat and good value for money if you shop around

The restaurants/pubs are great I've had great food and cocktails here. The nightlife in Belfast is amazing

Beauty / quality of specific attractions

It has some beautiful locations, great scenery, and accessible attractions

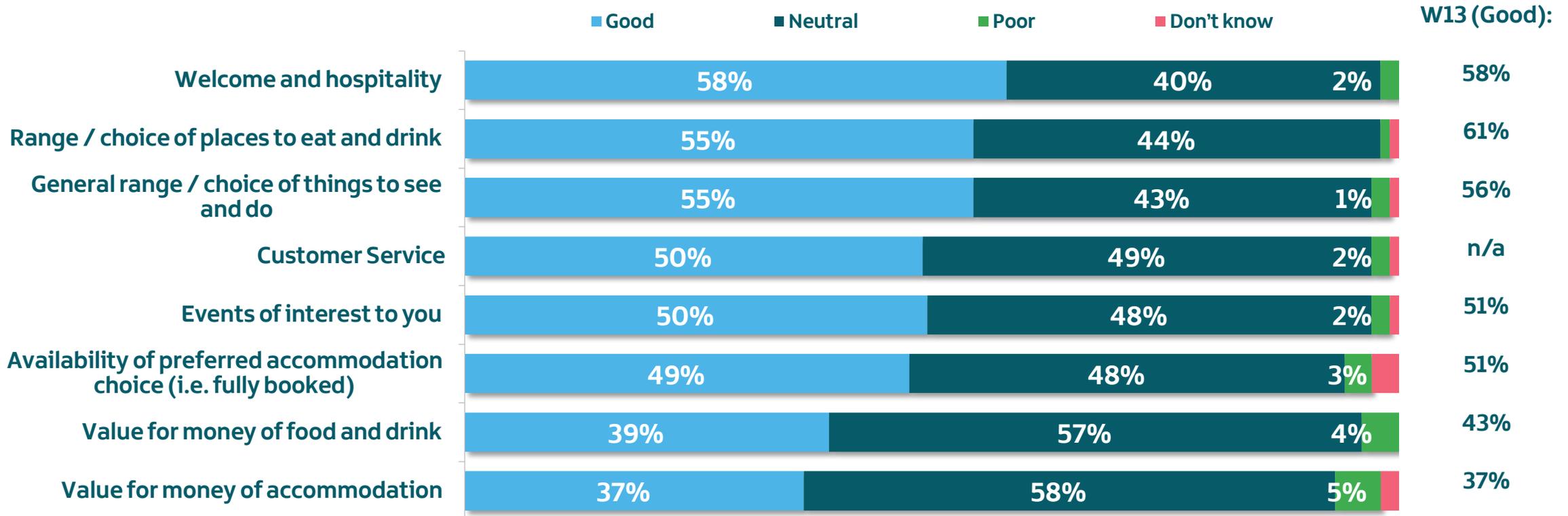
The people are so friendly in Northern Ireland , the scenery is beautiful, and food & drink is great quality

I took in the Titanic experience, the Giant's Causeway and a railway journey across the North coastline in one day, it was fantastic from start to finish. Next day we were in Derry taking in the sights. It was well worth the 9/10



Significant appreciation for welcome and breadth of choice of food / drink and activities

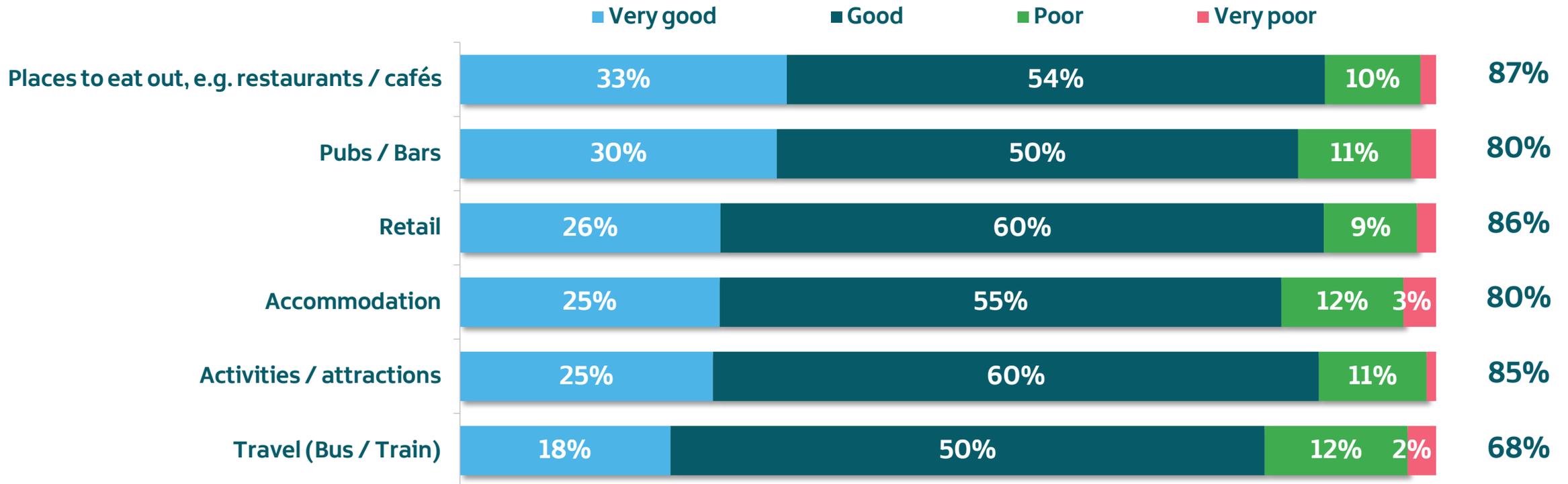
And on your recent trip(s) to NI, how would you rate the following...

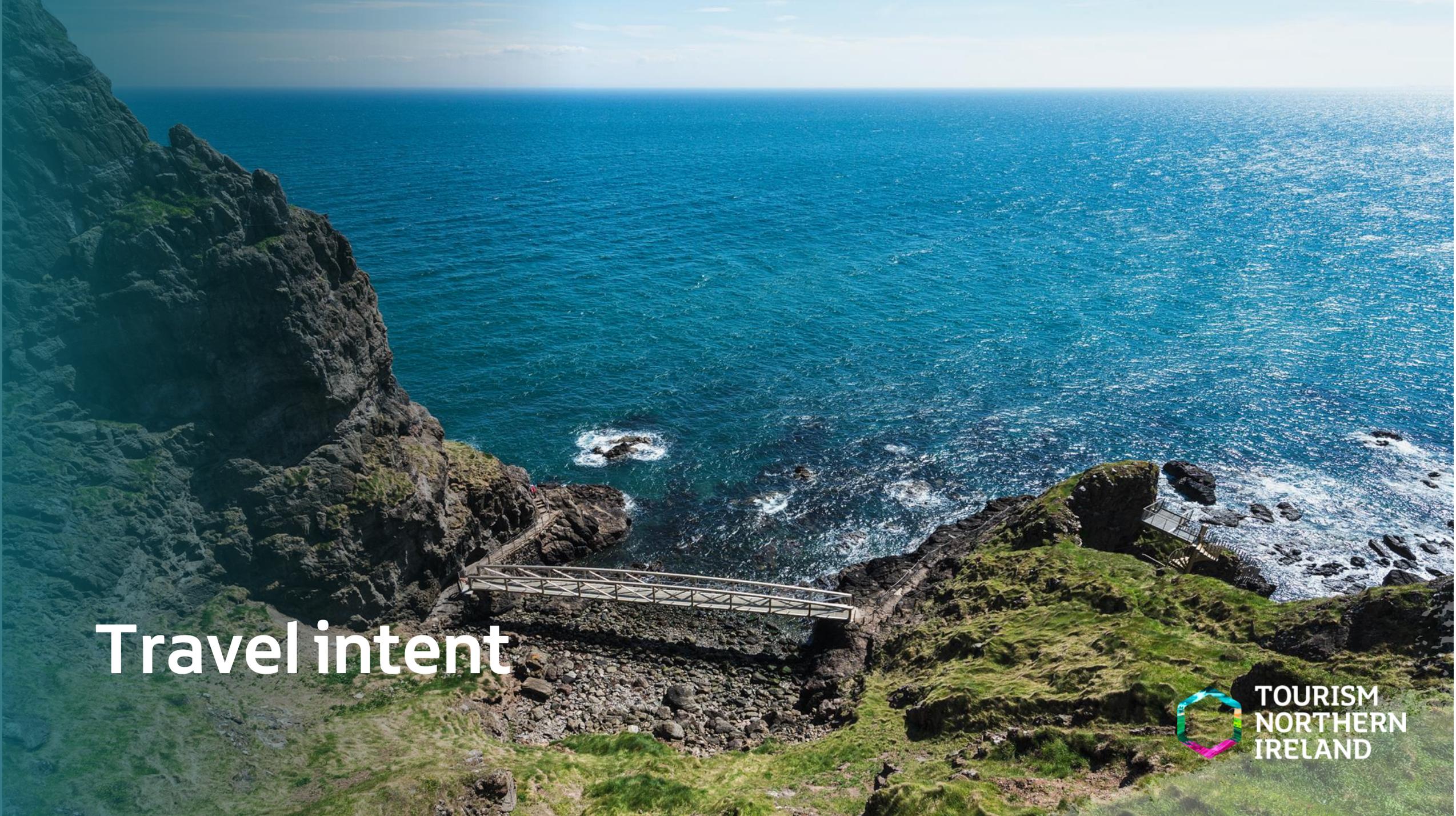


Customer service generally good across the board, especially in restaurants

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

NET Good



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

Travel intent

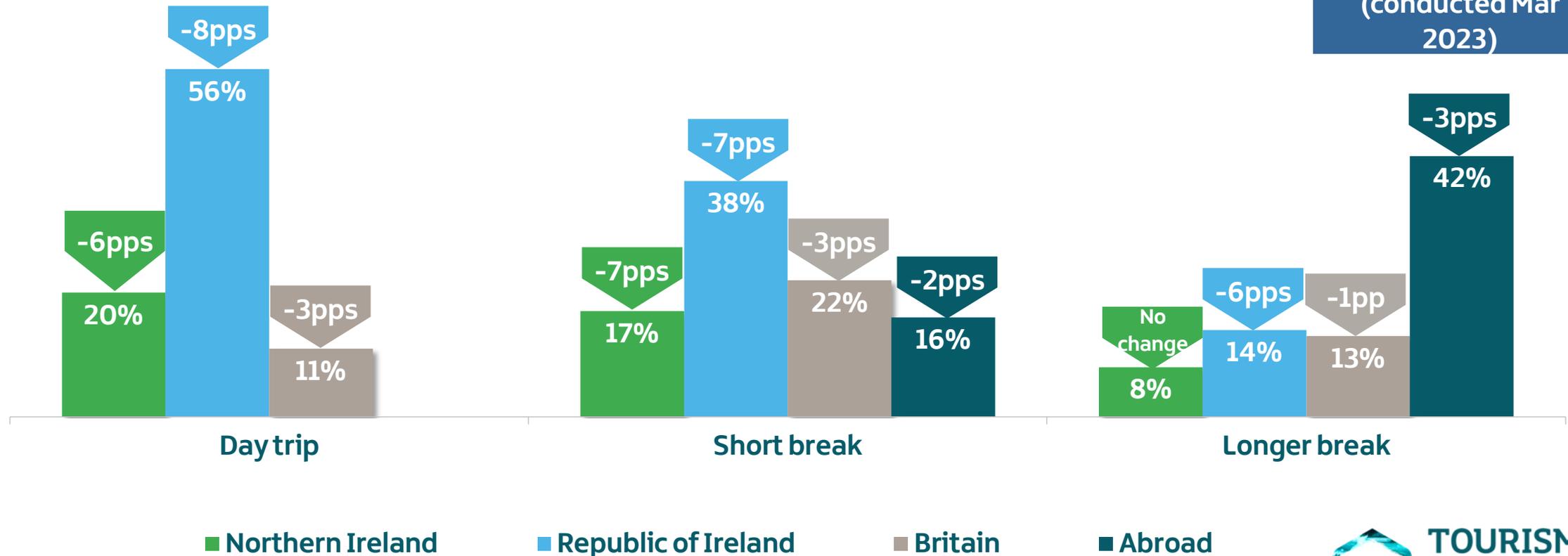


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Day trip & short trip intentions down, not just for NI but across the board – perhaps reflecting cost of living impacts

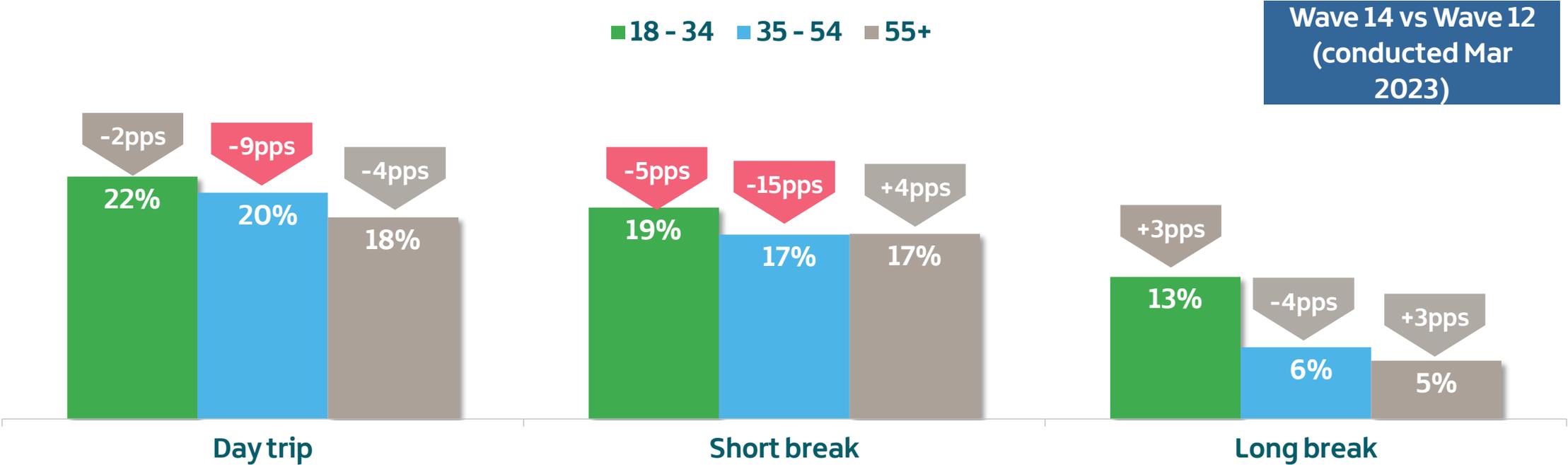
Intentions of taking a break in March – June

Wave 14 vs Wave 12
(conducted Mar 2023)



Trip intentions have decreased in particular among 35-54s – no longer the most likely group to be planning trips

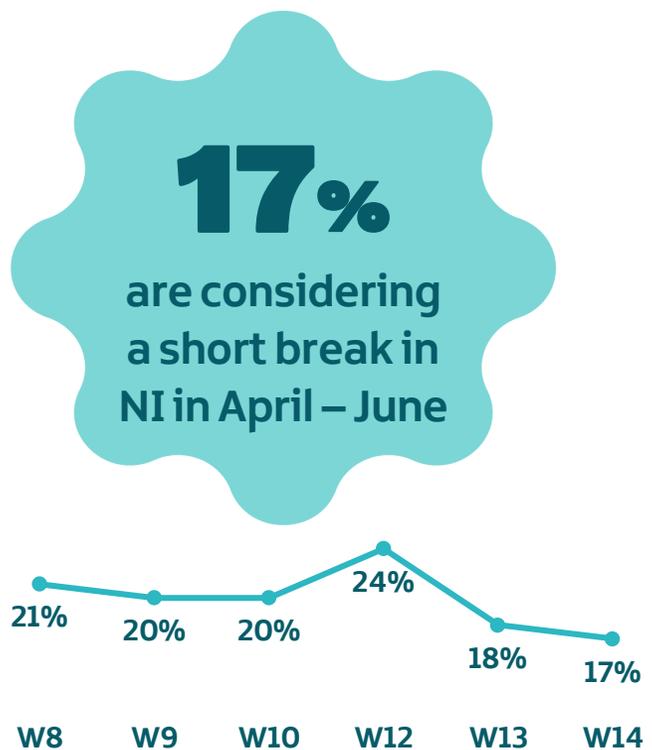
Trip intentions of taking a break in NI in March – June



N = 18-34 (240) 35-54 (300) 55+ (210)

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 coming months (March to June)?

Though steady compared to W13, compared to this time last year (W12), short trip intentions are down

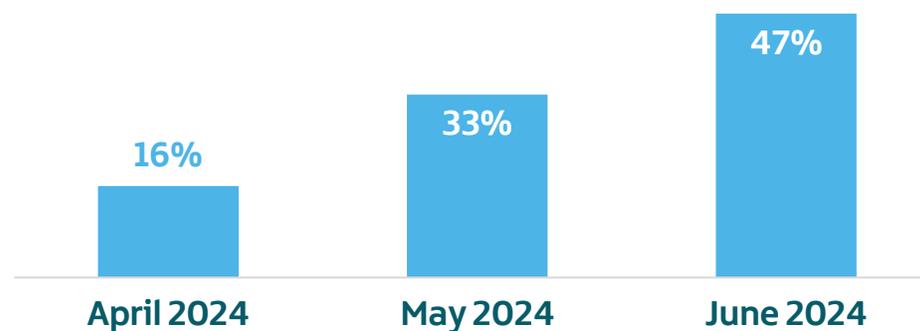


Status of short break – have they booked?



48% are actively planning or have booked a trip to NI – 8% of the total sample

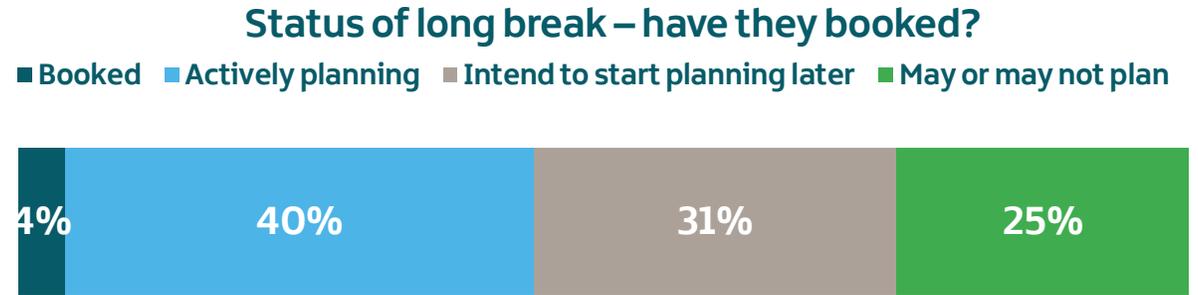
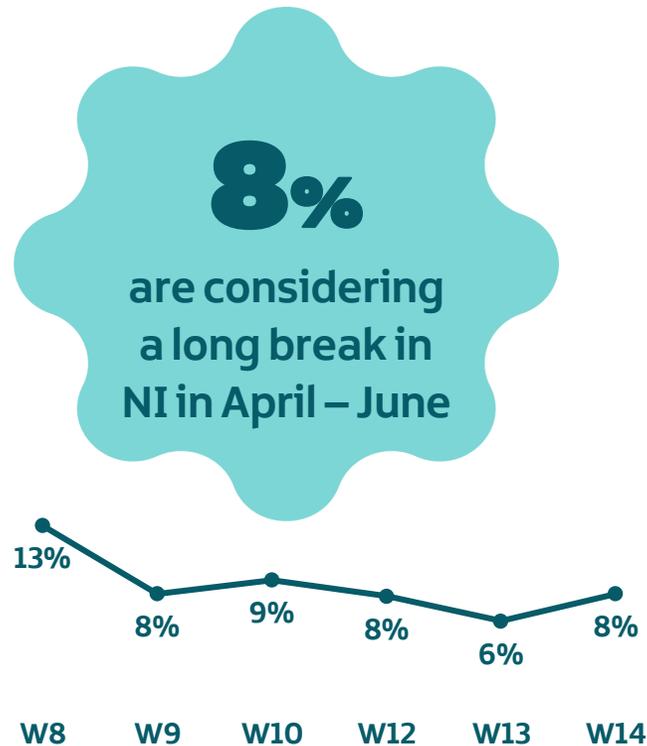
Short break planned for



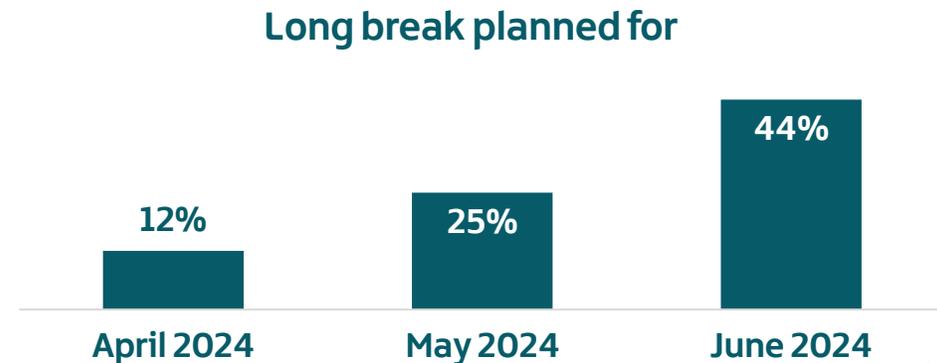
N = 750 / 131 considering short break / 54 planning a short break

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 trip intentions steady over past few waves – 2 in 5 actively planning but not booked



44% are actively planning or have booked a trip to NI – 4% of the total sample

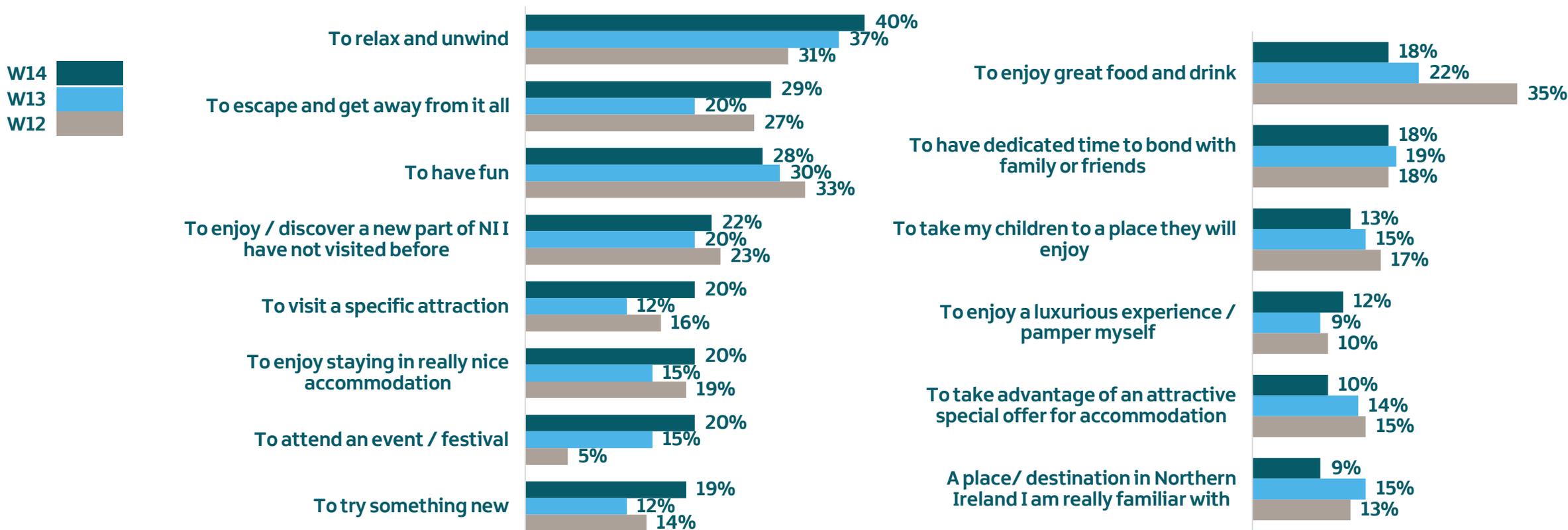


N = 750 / 59 considering long break / 23 planning long break (caution low N)

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?

Relaxation continues to grow as the top trip motivation – escapism & visiting specific attractions increasing as well

Trip motivations (long and short combined)



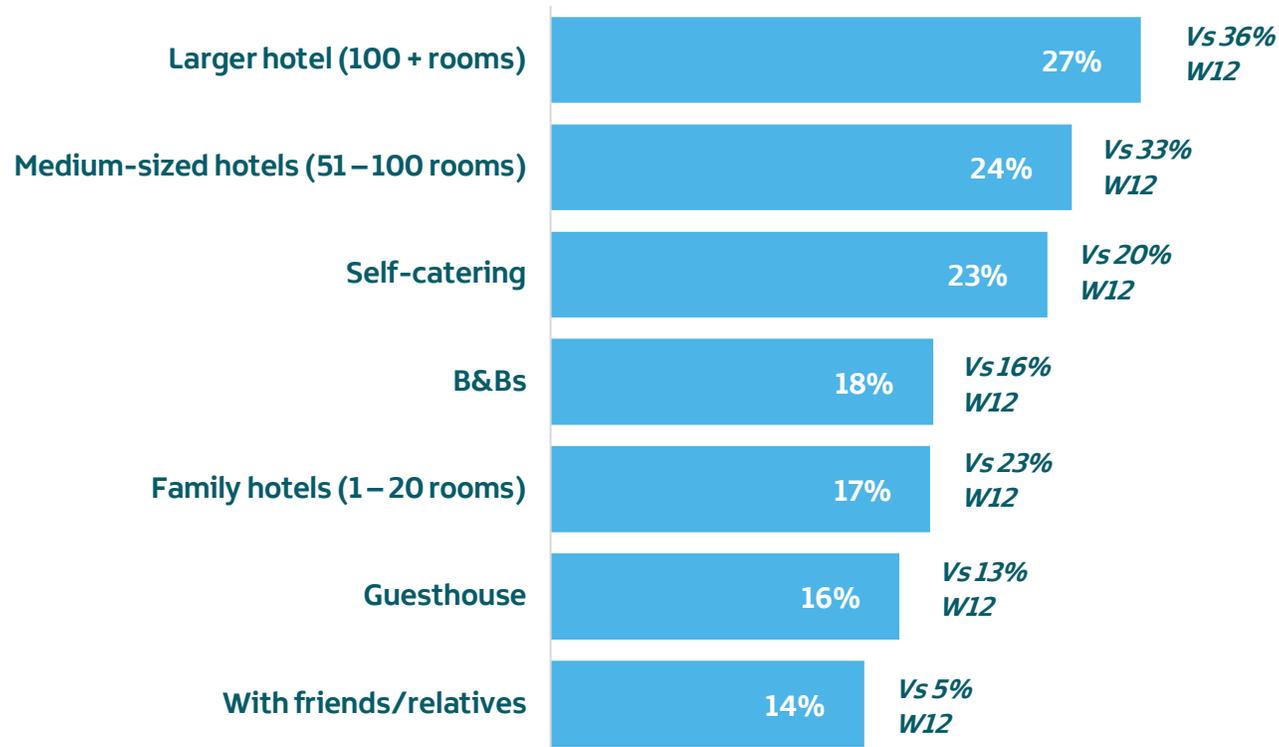
N = 113 planning long or short break (excl. "may or may not plan")

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

Hotels drop in popularity, and fewer family trips planned

Long & short breaks combined

Where staying (*showing 10% or higher*)

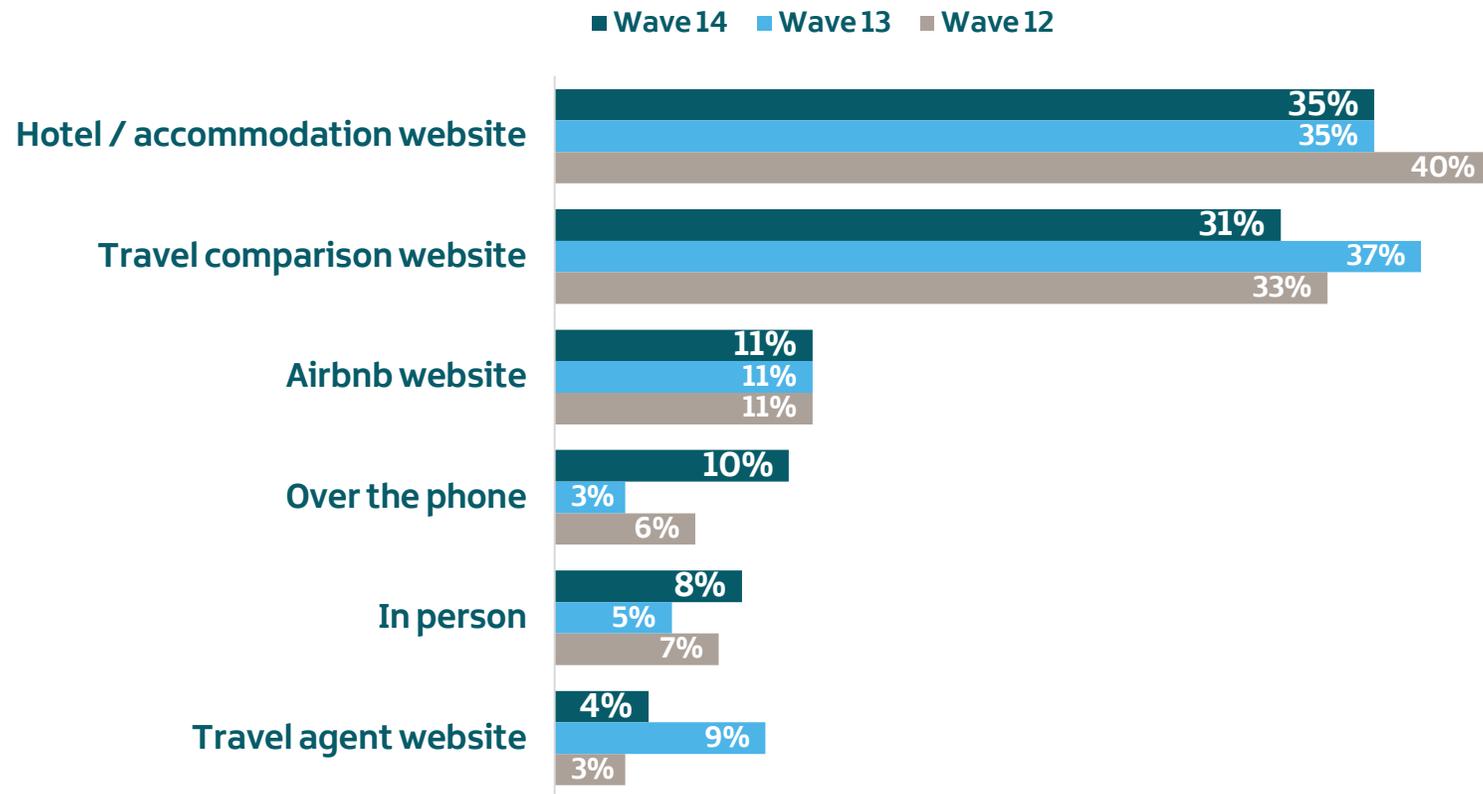


Who travelling with



The number planning to book on travel comparison sites has dropped – direct via hotel website now preferred

How they plan to book their trip



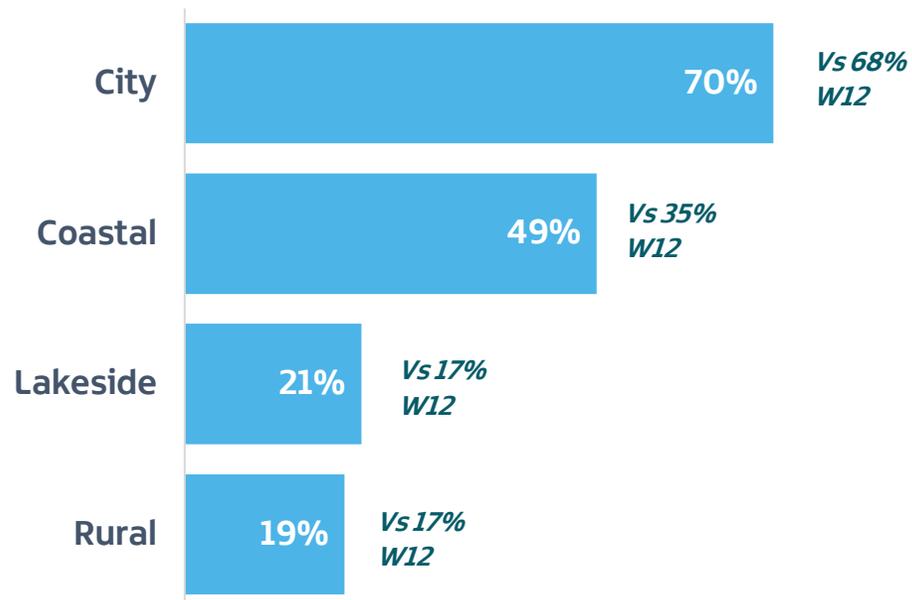
N = 113 planning long or short break (excl. "may or may not plan")

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

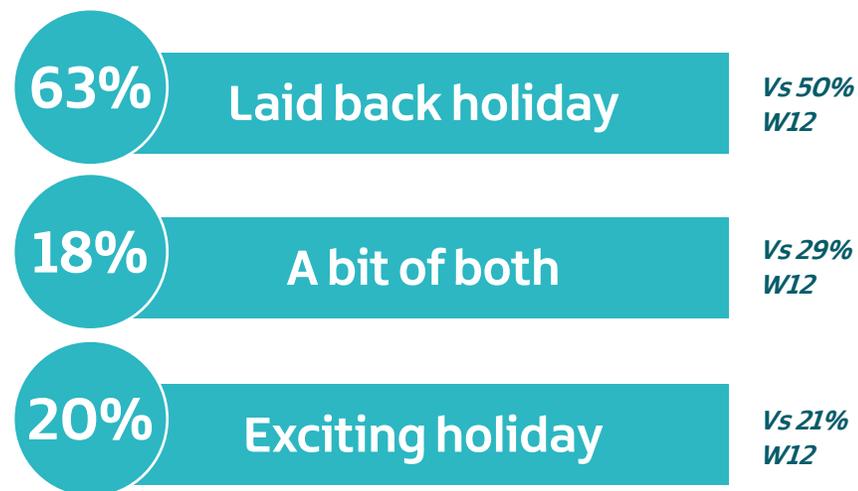


Significant increase in number saying they'll go for a laid-back or coastal holiday – coincides with growth in 'relaxation'

Type of break preferred



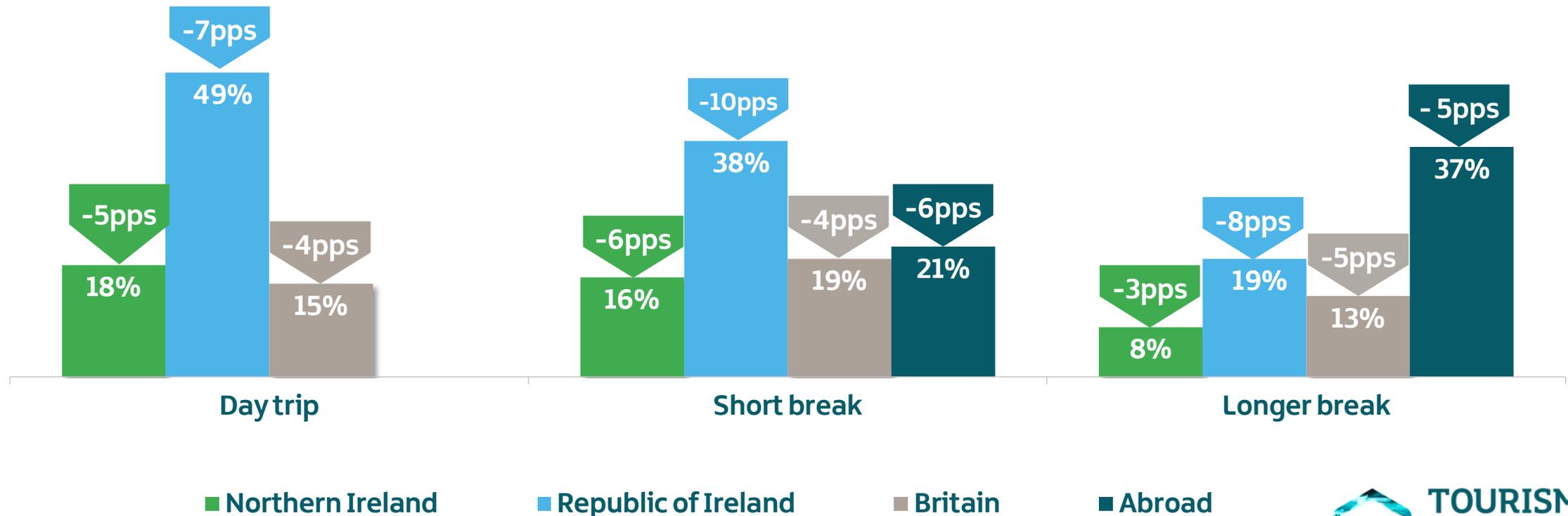
Type of trip preferred



More reluctance to travel later in summer – intentions drop across markets vs. this time last year

Intentions of taking a break in summer

Wave 14 vs Wave 12
(conducted Mar 2023)

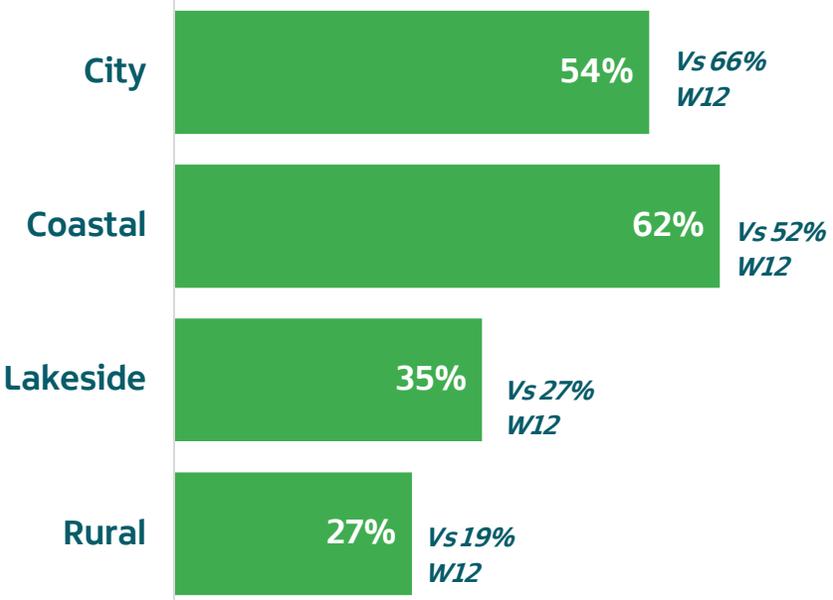


■ Northern Ireland ■ Republic of Ireland ■ Britain ■ Abroad



Coastal break intentions up for this summer vs. last summer

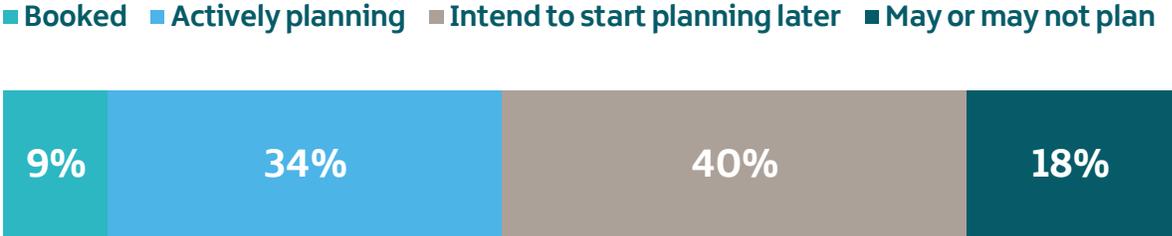
Type of break considered



Amount of short break planned



Amount of long break planned



N = 142 considering long or short break in summer

E24c Which of the following destination types would you consider in summer 2024 (July to August)? E25. Thinking about the short/long trip(s) you said you would consider for summer 2024 (July to August) in Northern Ireland, have you booked or thought about planning this short/long trip?

Trip abroad intentions are down 5 pps. over next 6 months

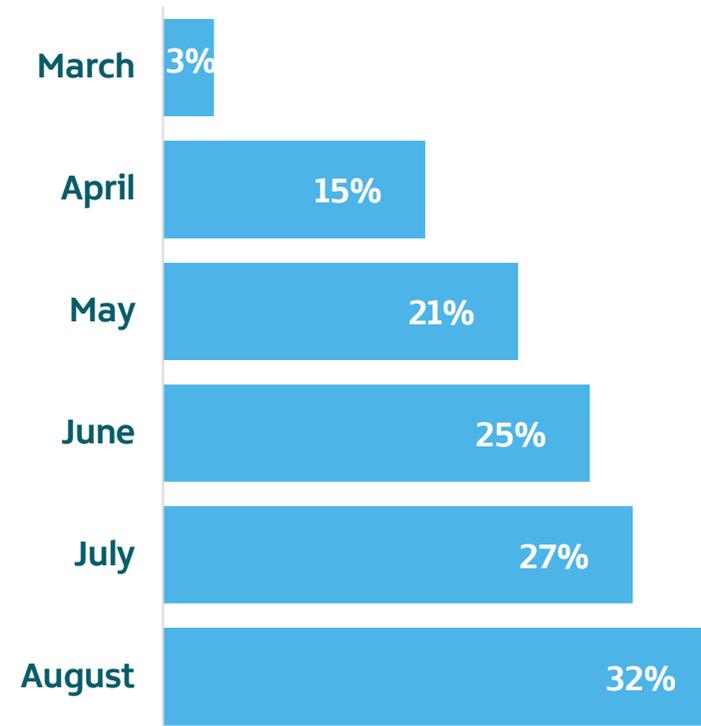
55%

of total sample are considering a break abroad in the next 6 months
(vs. 60% W12)

65%

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

When trips abroad are planned for

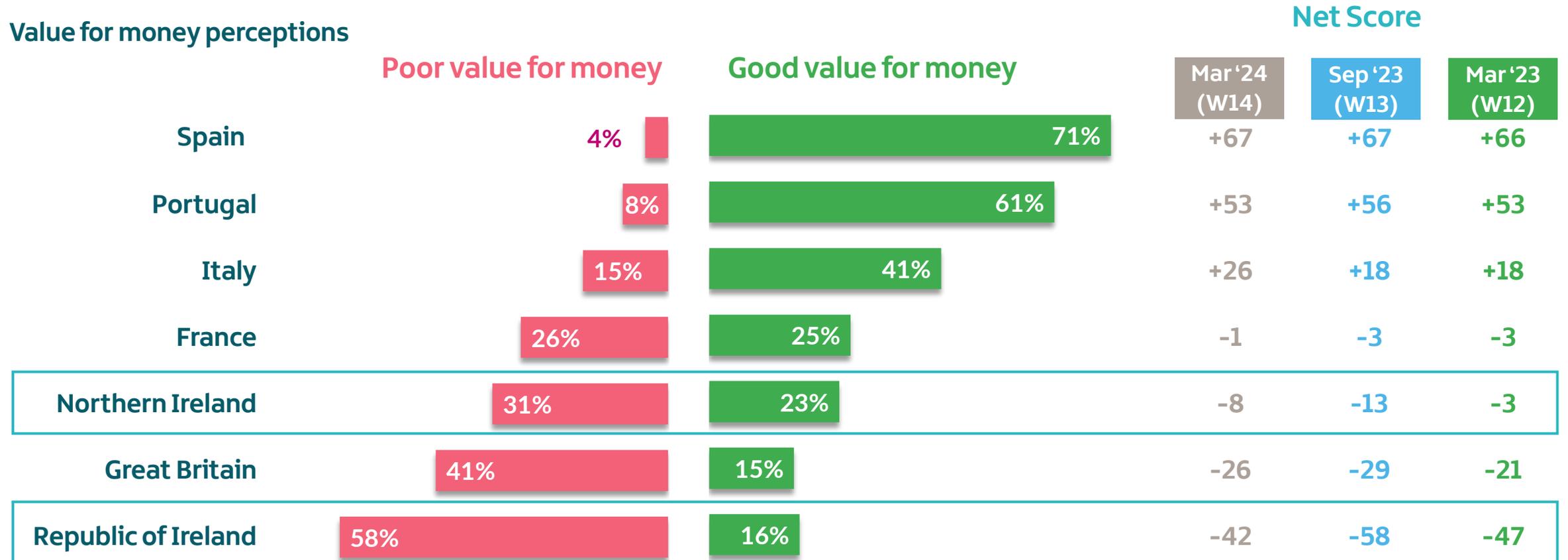


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Value for money

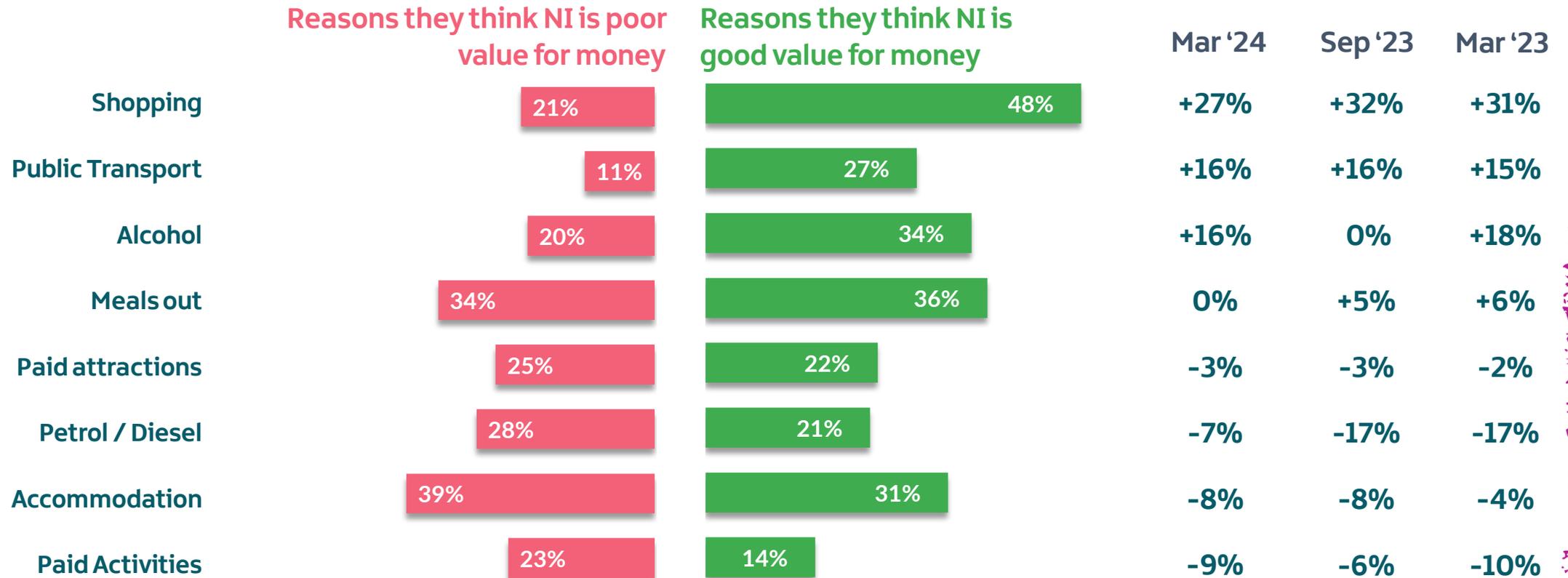
Some improvement for value for money perceptions compared to last wave for both NI and ROI markets



Shopping remains top VFM perception, but some decline since the last wave.

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

Net score





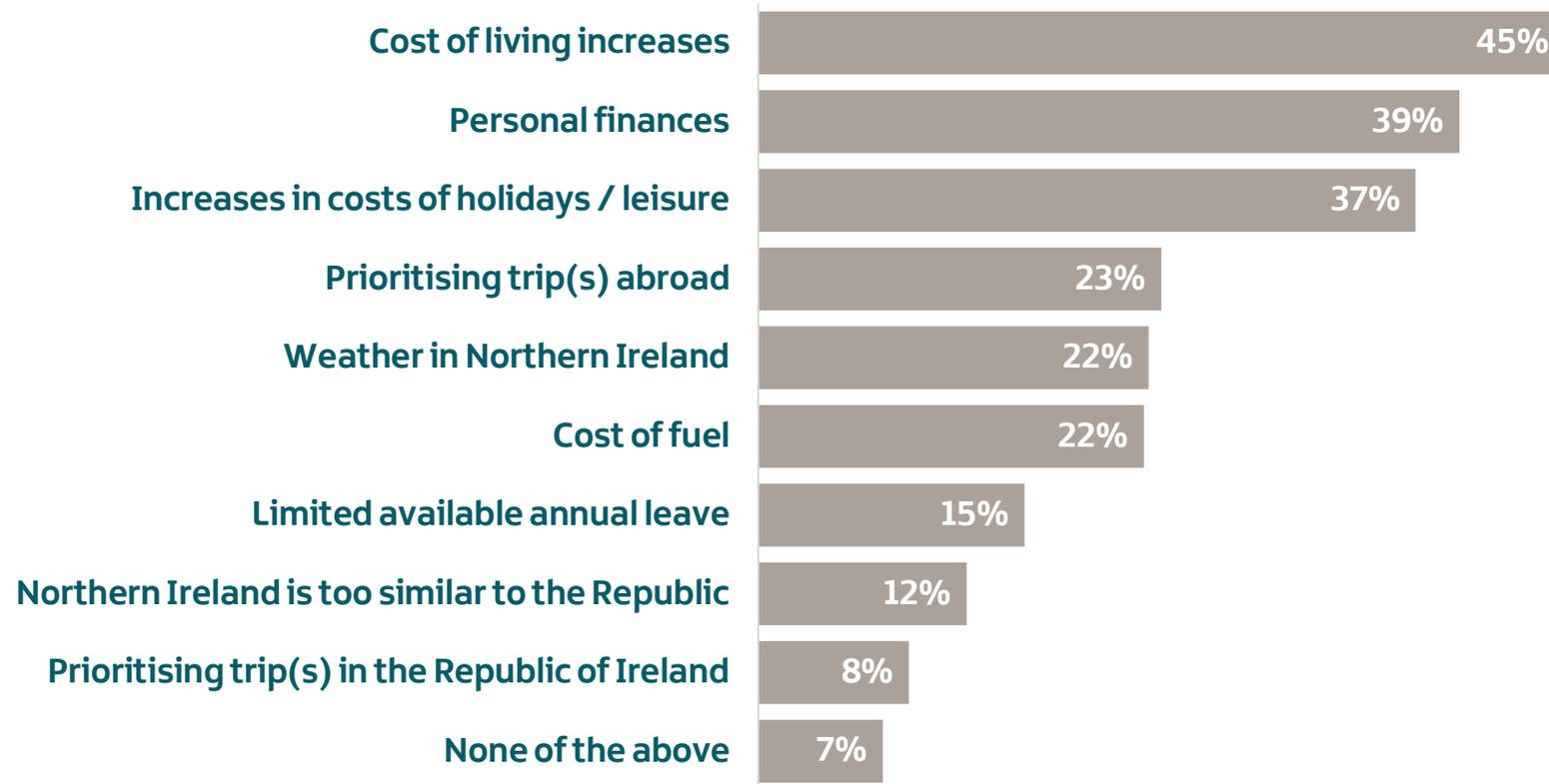
Cost of living



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Cost is very much at the forefront of people's minds when it comes to barriers to travel to NI

What could stop them going to NI



These top three combined were mentioned by 69% of participants

ABC1s more likely to be planning trips abroad instead (28%)

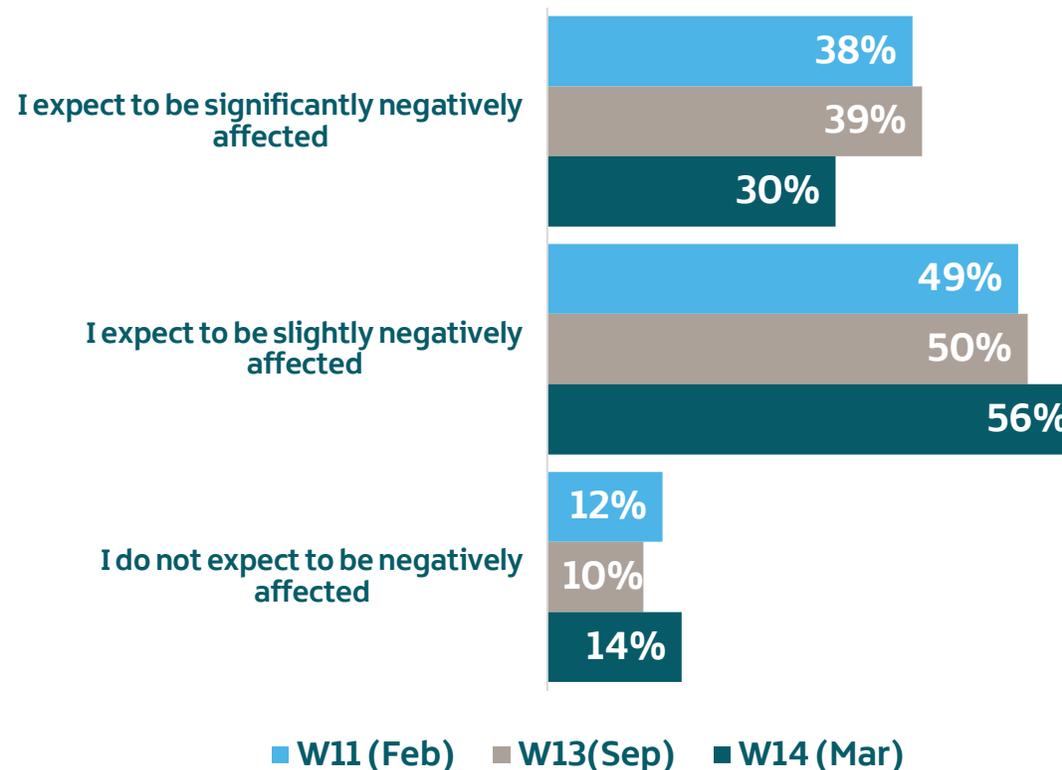
18-34s more likely to mention NI being too similar (19%)



There is a decrease in the number “significantly” impacted by cost of living – but vast majority still affected

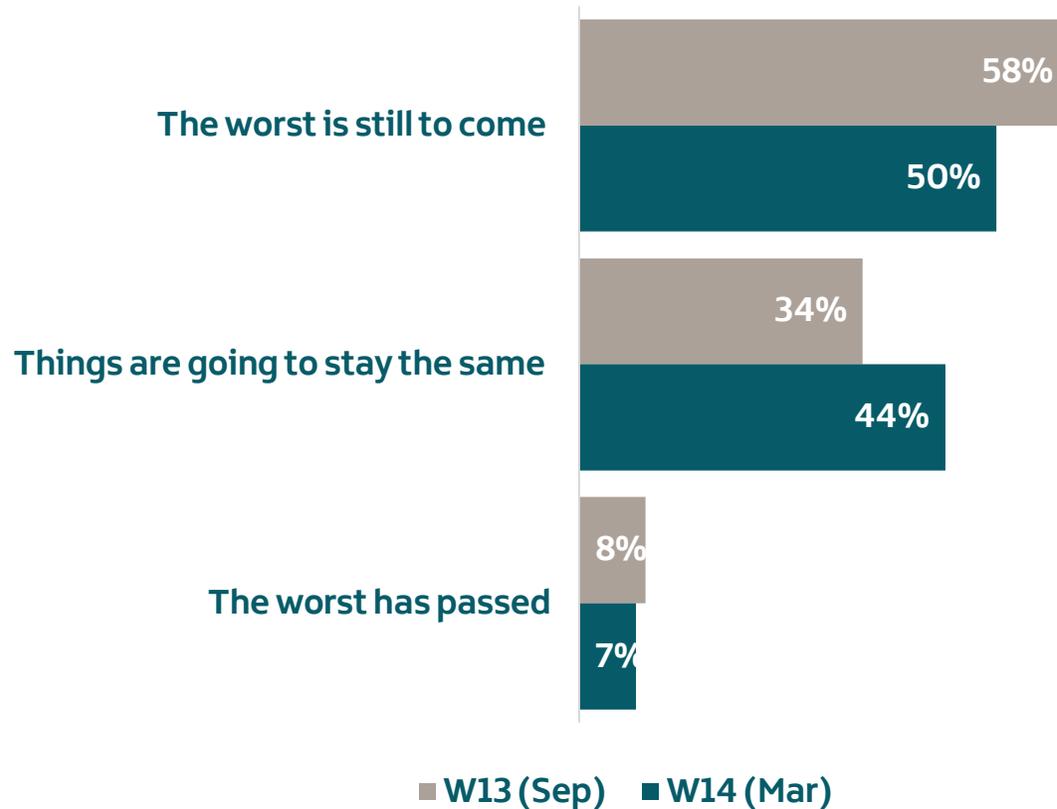
Extent to which people feel they will be financially affected by cost-of-living increases in coming months

86%
expect to be affected by cost of living increases



And there is still significant negativity with regard to how the situation is going to change in coming months

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

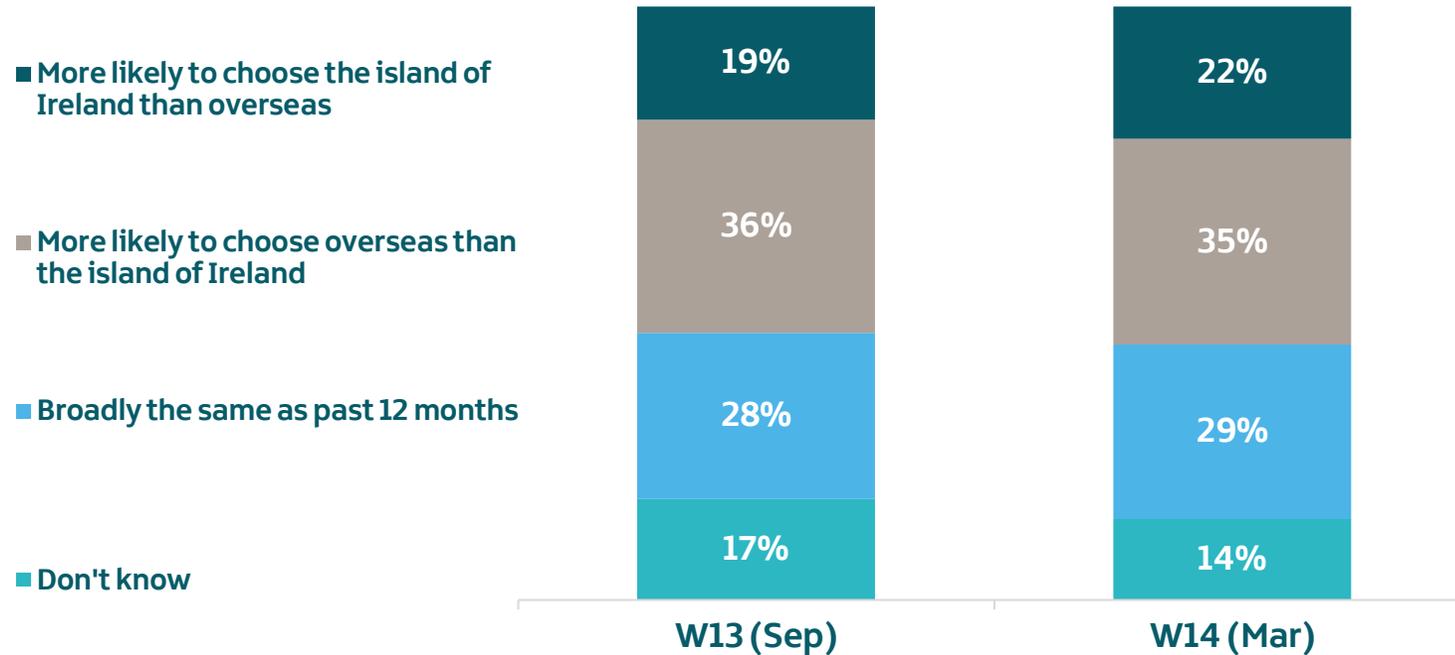


Women more likely to say they think the worst is still to come (55%), as are C2DE (55%)
Those with older kids also more likely to say this (61%)



Slight skew towards staying on IOI compared to past 12 months, but still a third more likely to go abroad

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



Those who are going to be significantly impacted by cost of living are more likely to say they'll pick IOI (32%)



Drop in number planning on cheaper trip abroad and marginal increase in number staying in ROI

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

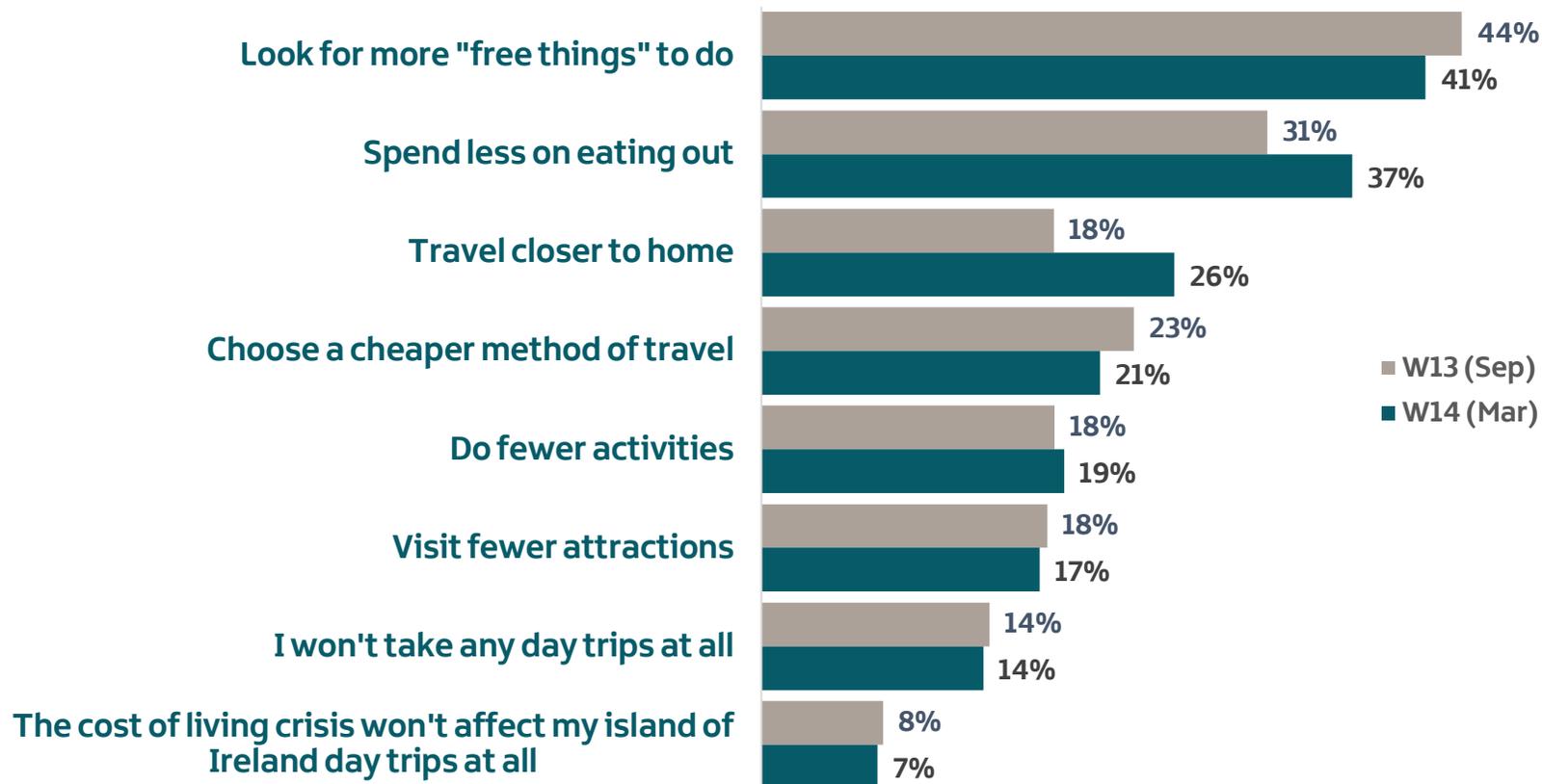


18-34s are more likely to say they'll take a cheaper trip abroad (34%) – notable that this was much higher last wave at 45%



More focus on spending less on food / travelling closer to home when it comes to day trips

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



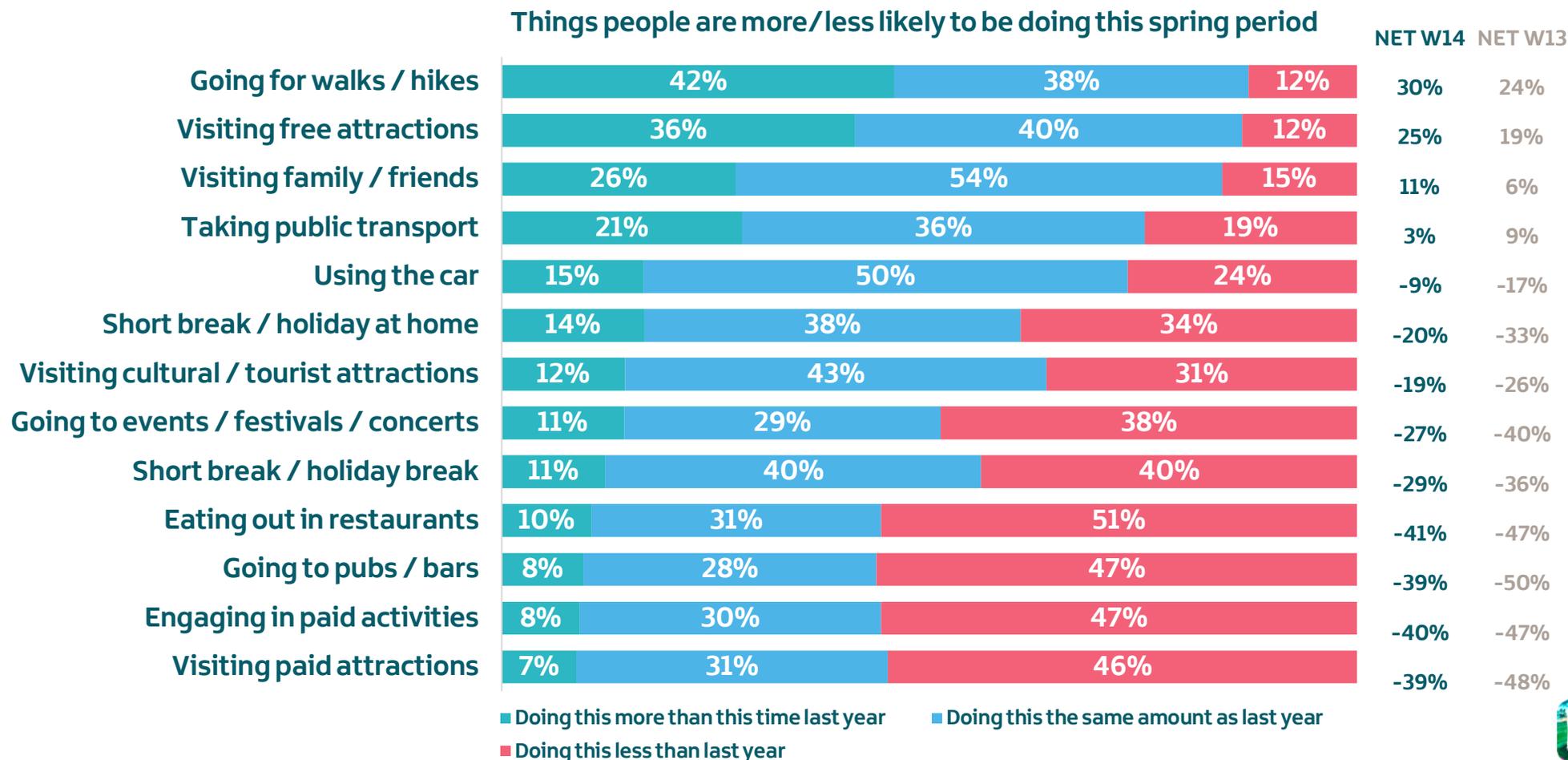
Those planning day trips in NI are more likely to say they'll spend less on eating out (49%)

18-34s more likely to choose a cheaper transport method (28%)

Over-55s more likely to take no day trips at all (23%)



People less likely to do paid activities / attractions and eating out vs. last year – but there is a positive trend here



Net scores improve vs. Sept – mainly due to drop in people saying they'll be doing things less vs. last year



- 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

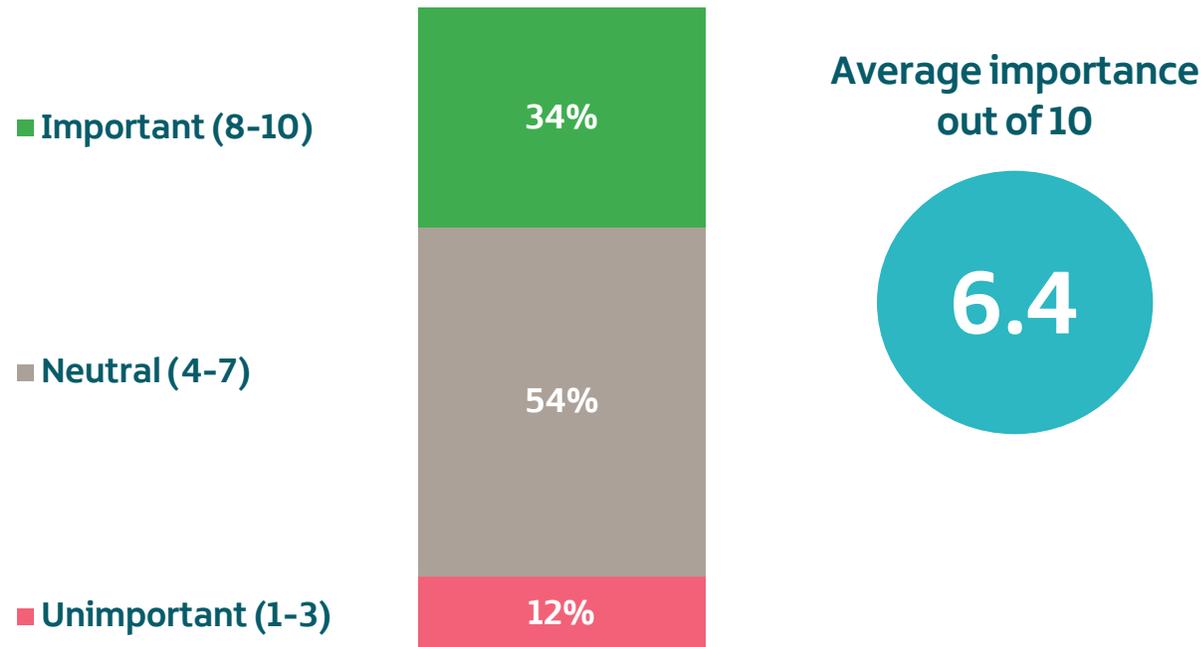
Food & drink experiences top rated by those in ROI – cultural activities also attract some interest

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 to NI?



More likely to say culture / arts is important:

- 18-34s (43%)
- Those planning a trip in NI (50%)
- Active Maximisers (46%)

2 in 3 say events/ festivals are important to them when visiting NI – accommodation/ ease of getting there/ activities highest on list

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





Summary



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Summary

Drop in travel intentions – but not just for trips to NI

- A drop across the board (not only to NI but in ROI and abroad) vs. this time last year when it comes to trip intentions.
- Both short breaks and day trips impacted in NI and ROI over next 6 months; also a drop (5 pps.) when it comes to long breaks abroad.

Trips abroad may be impacted negatively in coming months – people may start looking to IoI instead

- 7 in 10 participants mentioned some impact of cost of living (whether on their finances or increases in holiday costs) as barriers to travel to NI - and there is now also less appetite to take a cheaper trip abroad. In previous waves we had seen trip abroad intentions increasing at the expense of holidays on IoI whereas now all trips seem to be impacted.

Plenty of positives still – particularly in experiences & long break plans

- 1 in 6 ROI consumers still planning a short break in NI in the next few months, and long trip intentions are stable vs. last year, showing that there are people still intent on visiting NI.
- Experiences of NI are also still strongly positive - 9 in 10 say trips met or exceeded their expectations.
- And experiences of customer service/ welcome and range of things to do are still seen as very good.

Travellers looking to take more “relaxing” breaks than in previous months

- Perhaps linking in with cost-of-living related difficulties, those who are planning trips are looking more for relaxation/ escapism than in previous waves - with increased preferences for laid back holidays in NI rather than exciting ones, and coastal trips.