Consumer Sentiment
ROI Market
September 2021

tourism northernireland



SPARK
The Strategic Insight Agency

Research Background

Research Background & Objectives

This is the fifth wave of our consumer sentiment barometer for the Republic of Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere, as ROI catches up in terms of opening up relating to Covid.

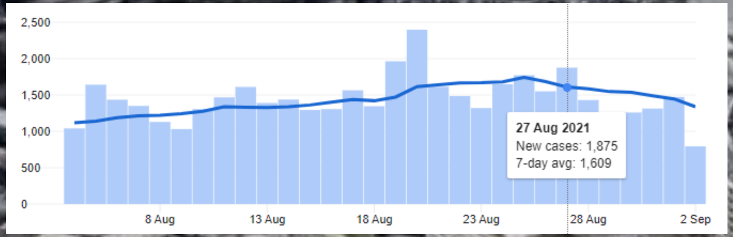
The research objectives:

- 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?

FW Dates 12th – 27th Aug

Covid cases grow slightly in NI and ROI throughout August



12th Aug

Over 50,000 register for vaccine for 12-15-year-olds

20th Aug

Taoiseach warns Covid-19 restrictions to remain until next year

21st Aug

Covid-19: Northern Ireland's summer surge figures make for grim reading

We interviewed a robust, nationally representative sample in the Republic of Ireland

Total sample = 750

Gender

51%

48%

Social Grade

ABC1: 44%

C2DE: 56%

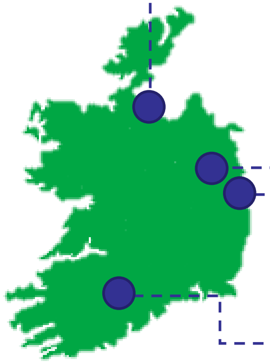
Age

18-24 years	11%
25-34 years	19%
35-44 years	20%
45-54 years	18%
55-64 years	15%
65+ years	17%

Lifestage

PreFamily	28%
Young family	13%
Middle Family	9%
Older Family	16%
Empty Nesters/ Older (45+) no kids	35%

Region



18% Connaught / Ulster

27% Rest of Leinster

27% Dublin

27% Munster

Base n = 750

Key Takeaways

While situation improving slowly, high level of caution still exists

- Particularly around indoor activities/occasions where one would be static in a crowd
- Outdoor activities, scenery, venues have the lowest levels of unease for travellers at present
- 52% of our sample haven't travelled anywhere this year

Some nervousness re looser restrictions and higher Covid cases

- Divergence in how ROI and NI seen in terms of safety – **reassurance needed** that there is little difference in safety of NI vs. ROI
- ROI's own 'freedom day' in October and rise in cases may help redress balance

Expect good volume of trips (many of them last-minute) in September and October

- Positive uplift from the last wave considering short breaks in NI in next 3-4 months
- Last-minute bookings much more common among ROI residents – possibly less sure of whether they'd be able to travel / trips might be cancelled?

Visitors to NI find things cost a little more than expected – but hasn't impacted on image of NI as good VFM

- Perceived NI VFM – compared to ROI and GB – is getting stronger
- Those who visited NI did notice things costing more than they expected – but still gave very strong score for NI value for money
- 97% of people who visited NI (56) said the trip met or exceeded expectations

Covid-19 and Tourism

Covid situation getting better and better, but be mindful that **some think the worst is still to come**

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

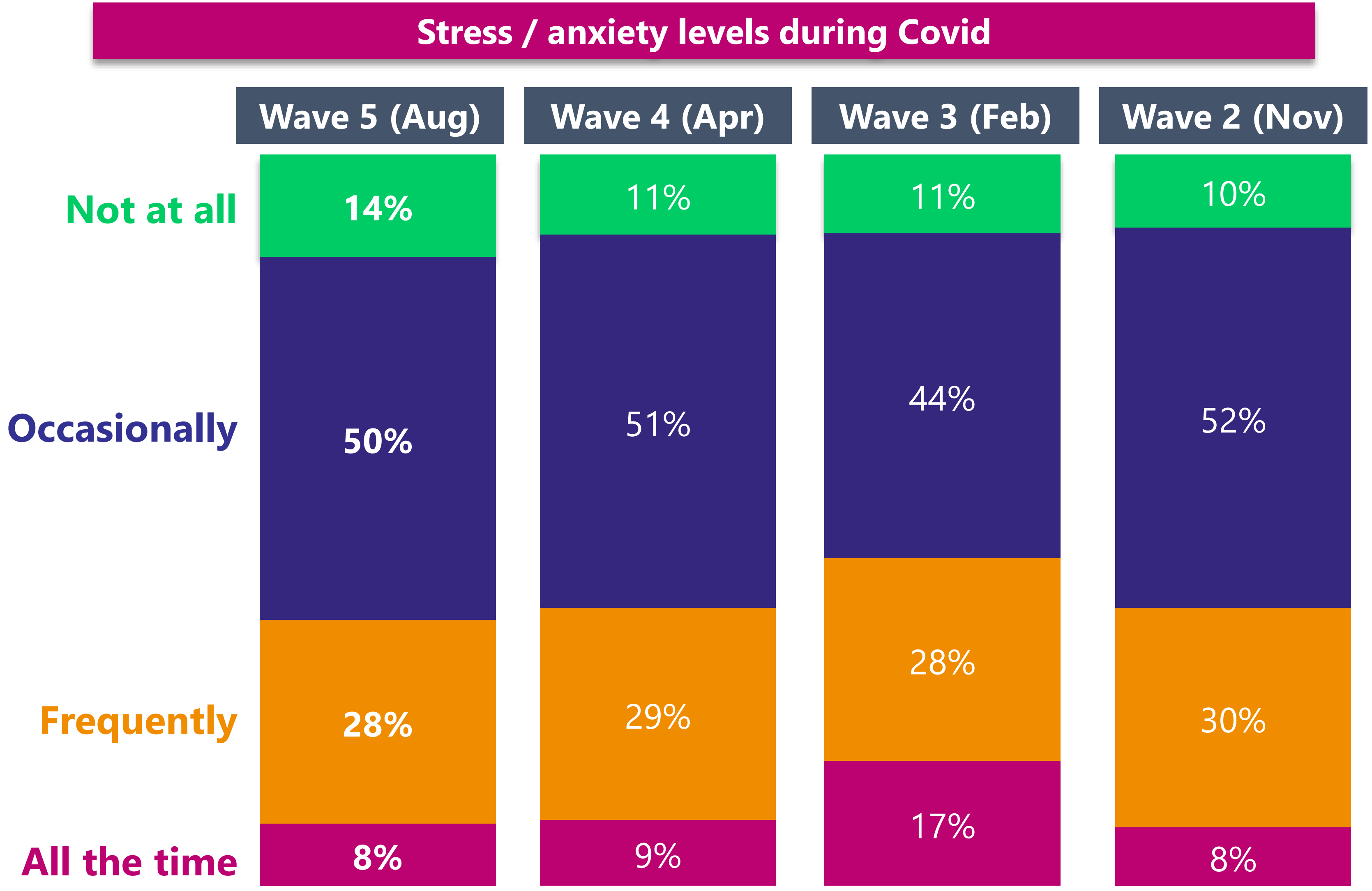
More negative outlook among **young families** (26%) and those **not fully vaccinated** (25%)

More positive outlook among **over 65s** (58%), **open minded explorers** (49%) and **males** (48%)

Base n = 750

A1a. Regarding the situation of Coronavirus/Covid-19 in the Republic of Ireland and the way it is going to change in the coming month, which of the following best describes your opinion?

Little change in reported anxiety during Covid-19 – **mindsets not yet shifted** despite loosening of restrictions



Most likely to report being anxious frequently / all the time:

- **Females** 44%
- **18-34** 46%
- **Young/mid family** 44%

Base n= 750

A1b. How would you describe your stress and anxiety levels during Covid-19?

Market Comparison

Covid-19 & Tourism

Neither market out of the woods – but NI sees more growing anxiety than ROI

More of a sense in NI that things are getting worse rather than better

43% in ROI say the worst has passed vs. 32% in NI (W4: ROI 34%, NI 39%)

Covid anxiety relatively stable in both markets – NI tourism industry should continue with cautious, Covid-secure messaging

36% in ROI say they have been feeling anxious frequently (down 2% vs W4), NI 40% (up 1%)

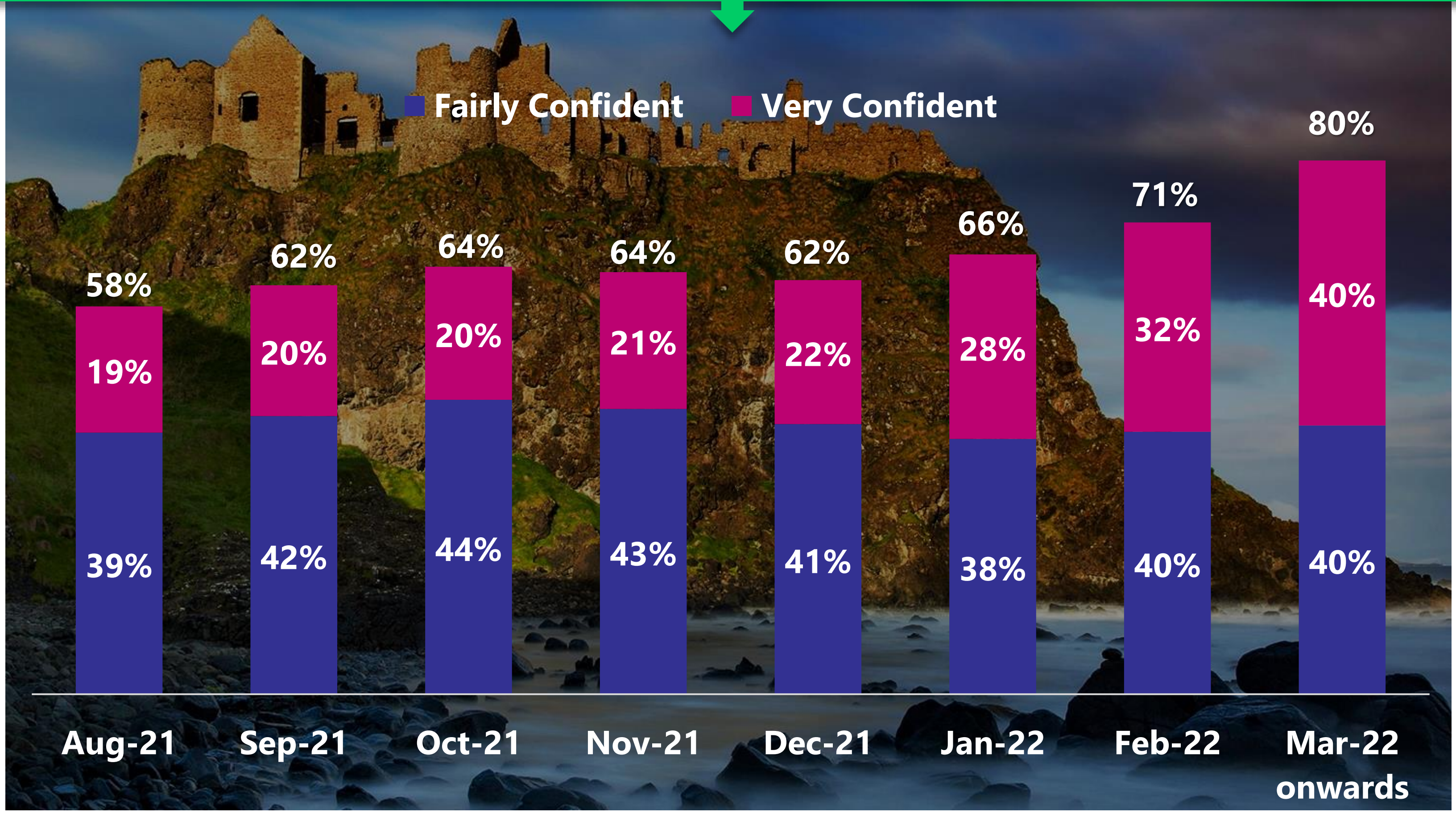
Current Attitudes towards Travel

Almost 2 in 3 are confident about being able to take holidays on IoI – expect **less hesitancy to book** in coming months

62%
would be confident in a holiday on IoI in September of this year

In W4 research conducted in April, **16%** were confident they could travel at that point and **60%** said they would likely be confident by September

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

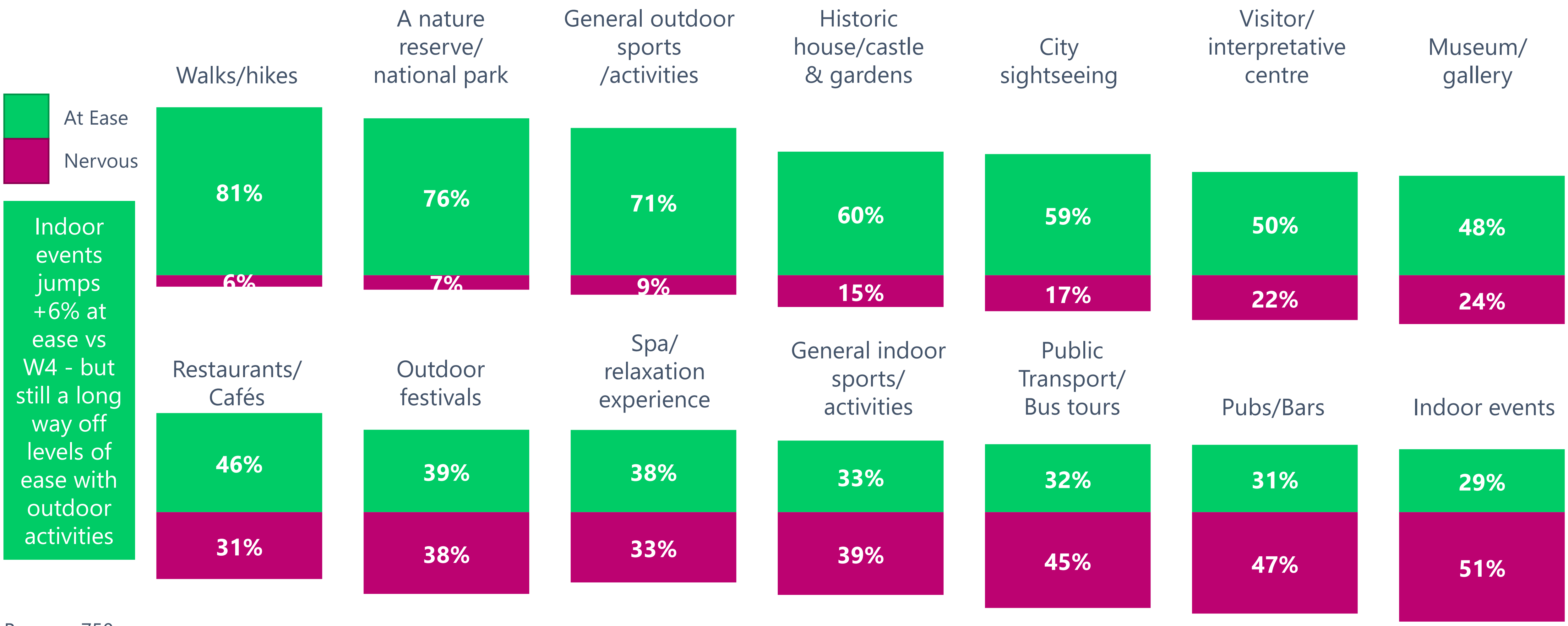


Base n= 750

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)?

Most indoor activities still causing unease – **in short term keep primary focus on outdoor**

Ease in engaging with activities this summer



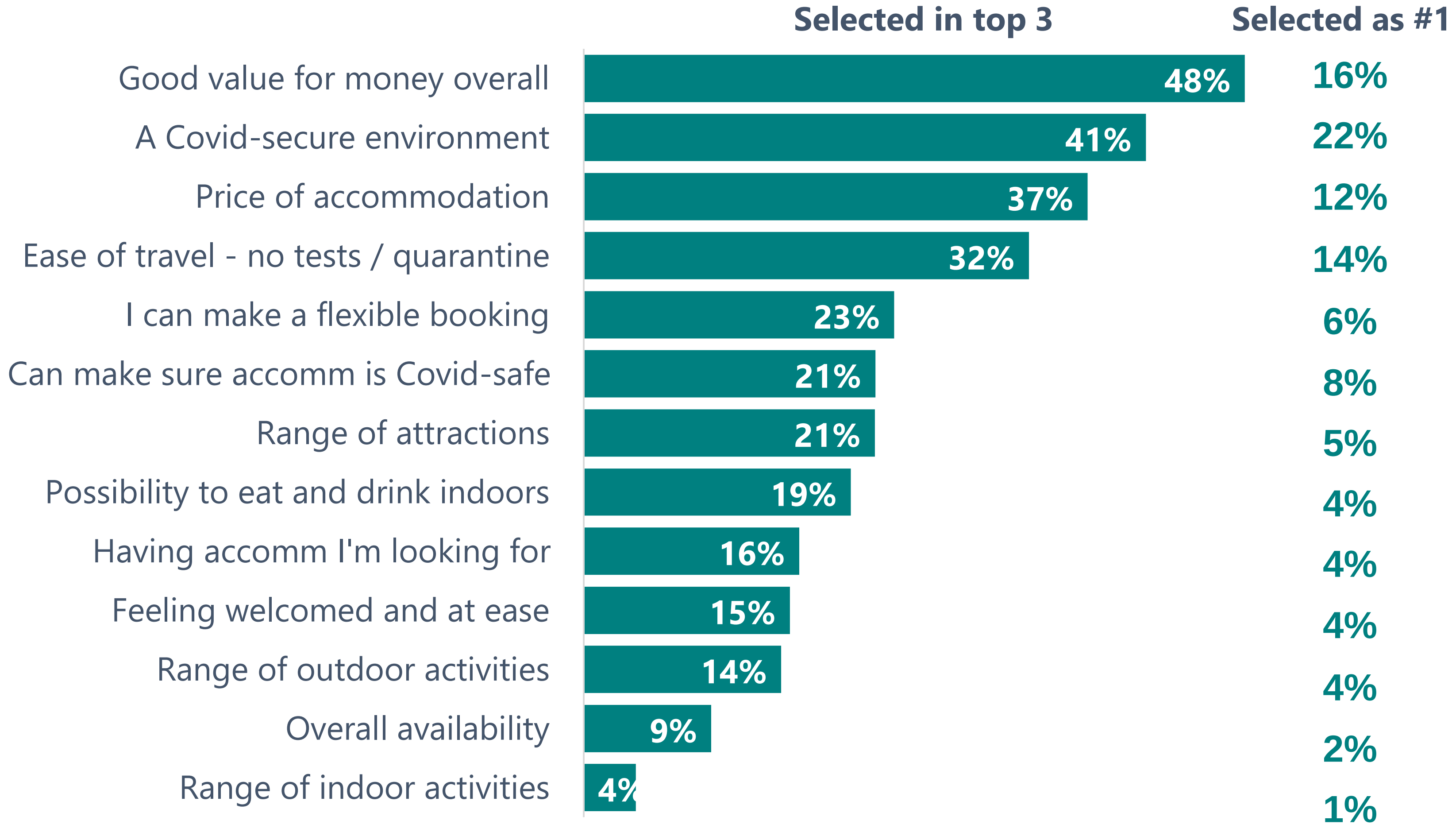
Indoor events jumps +6% at ease vs W4 - but still a long way off levels of ease with outdoor activities

Base n= 750

B4. How do you currently feel about engaging in these activities this summer (i.e. August – September)?

Value for money and **Covid-security** are crucial in current context and top of mind for consumers – this must be reflected in comms

Most important factors when it comes to holiday destination



More likely to select **Covid-secure environment** in top 3:

- 65+ (**57%**)
- Open-Minded Explorers (**48%**)

Top 3 priorities for those who took or are planning a trip to NI (n=131):

- Value for money **16%**
- Ease of travel **16%**
- Covid-security **13%**

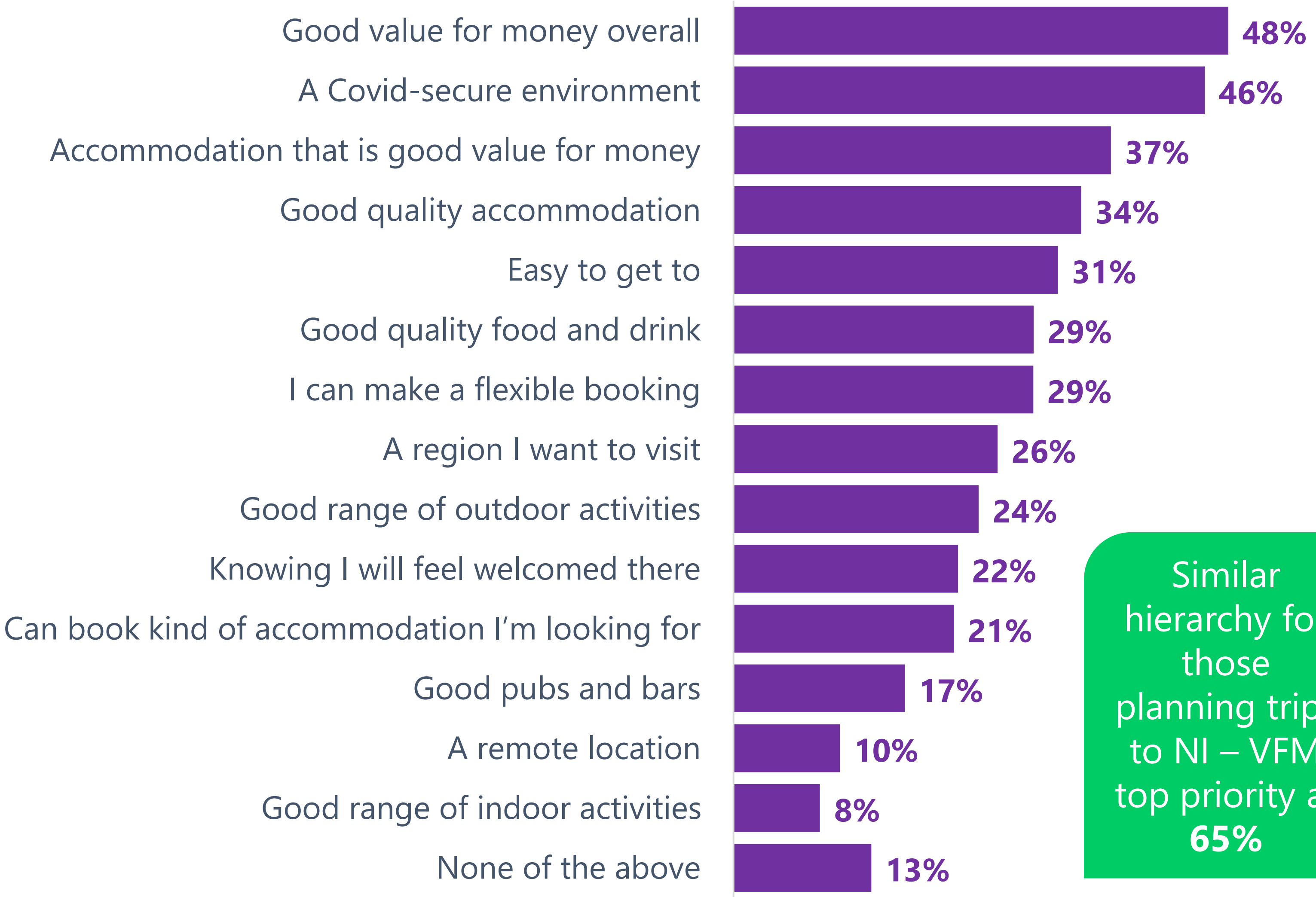
Base n = 750

B6. Thinking about when you are choosing a destination for a holiday or short break this year, please select the three factors which are most important to you

Triggers for considering NI are **very similar** to key decision factors in general

Potential visitors **need to be convinced of Covid security** especially in light of the growth in cases

Triggers to consider a short break in NI



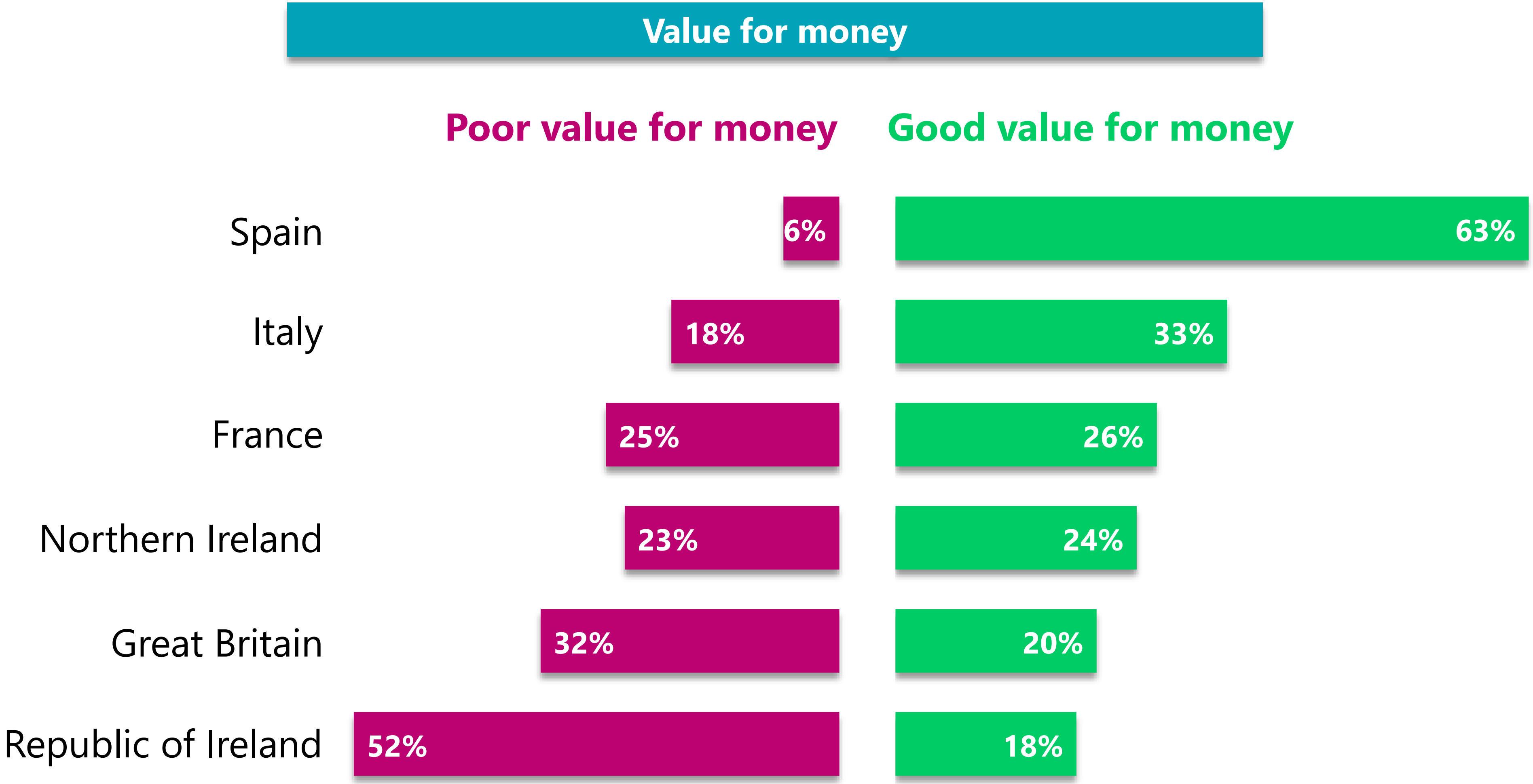
Similar hierarchy for those planning trips to NI – VFM top priority at **65%**

Base n = 750

B7. Which, if any, of the following would make you more likely to consider a short break in Northern Ireland this year?

Value for Money

NI VFM reaches **net positive score** while ROI drops back even further – opportunity remains to **capitalise on this perception**



Net Score

	Aug	Apr	Nov
Spain	+57	+57	+31
Italy	+15	+18	+12
France	+1	0	-4
Northern Ireland	+1	-8	-3
Great Britain	-12	-15	-10
Republic of Ireland	-34	-28	-11

N = 750

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

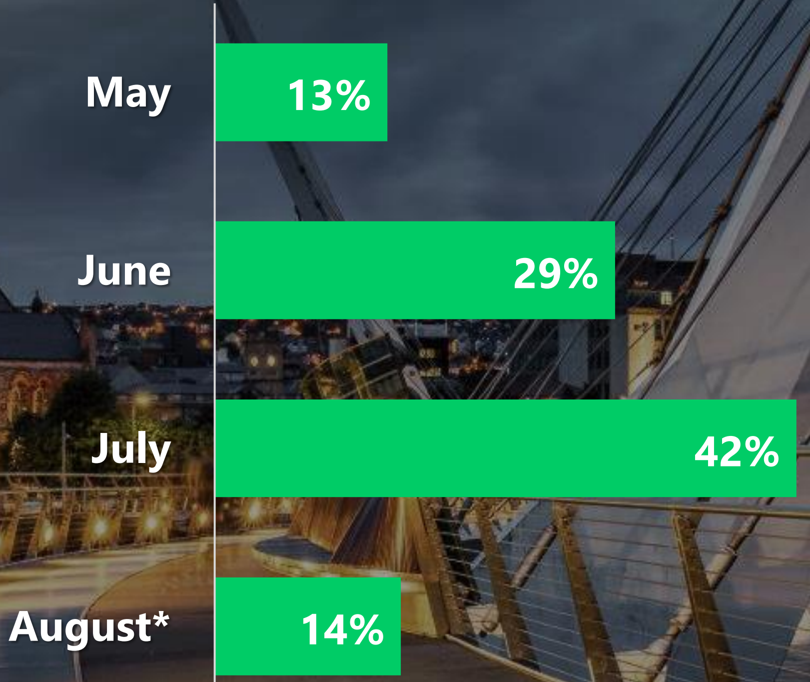
Travel experiences of NI in 2021

Significant **uplift in visitors in July** in particular, and good to see **1 in 2** visitors were first-timers

8% have taken some sort of holiday in NI in 2021

48% were first time visitors to NI

Holidays taken in...



Aug likely lower as fieldwork took place in mid-Aug

N = 750 / 56 visited NI (caution low base size)

Other than NI...

- **39%** took a break in ROI
- **7%** went abroad
- **52%** 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 in 2021? / D3. And when did you take your holiday(s) or short break(s) in Northern Ireland in 2021? / D4. Was this your first time taking a holiday or short break in Northern Ireland for leisure purposes?

Trip **satisfaction high** particularly regarding accommodation and hospitality – expectations met across the board but room to **lift NPS** score to exceed them

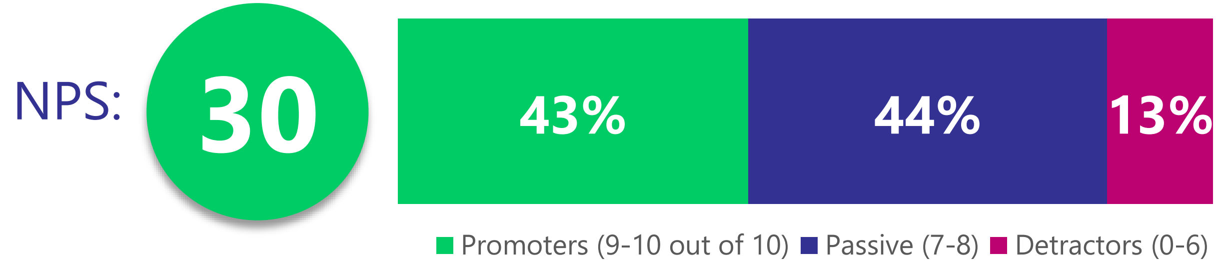
How trip stacked up to expectations

40% said their trip **exceeded expectations**

57% said their trip **met expectations**

3% said their trip **didn't meet expectations**

Net Promoter Score



**NPS is calculated as the % of promoters minus detractors – anything above 0 is a good score. A score of 30 is very high and indicates high likelihood to recommend to others*

Reasons for strong scores (8+ out of 10)

"*Easy to get to. People friendly. Lots of attractions and things to do. Easy to get around*

The pubs were open and there was good atmosphere and weather

It was welcoming and good value for money

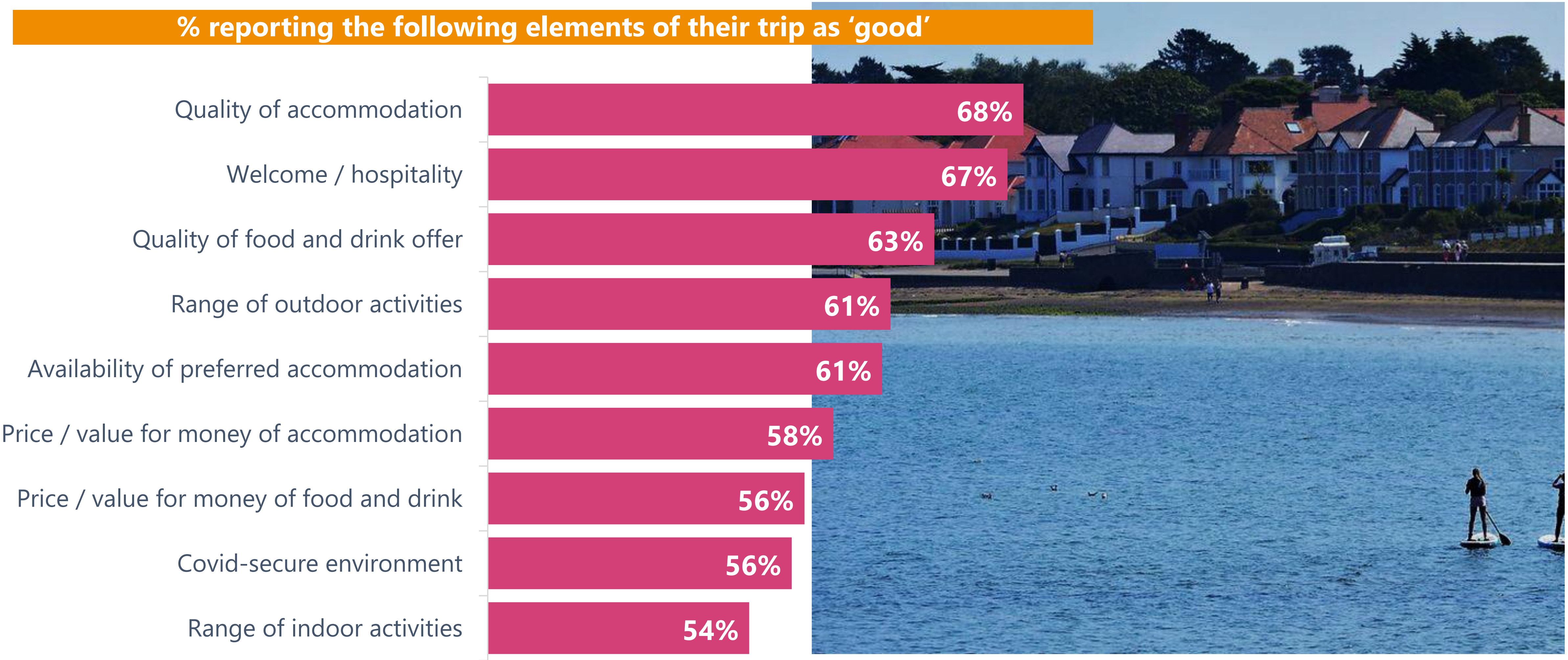
Shopping wise there was good value for money, and accommodation costs were good

A great city, lots of shops and bars/restaurants"

Base n = 56 (caution low base size)

D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations? / D6. Thinking about your trip(s) in Northern Ireland, how likely are you to recommend it as a holiday destination to friends or family?

Positive scores for all elements of trips, with NI seen as **high quality** – scores slightly weaker on Covid security, important to improve this as it is a key aspect



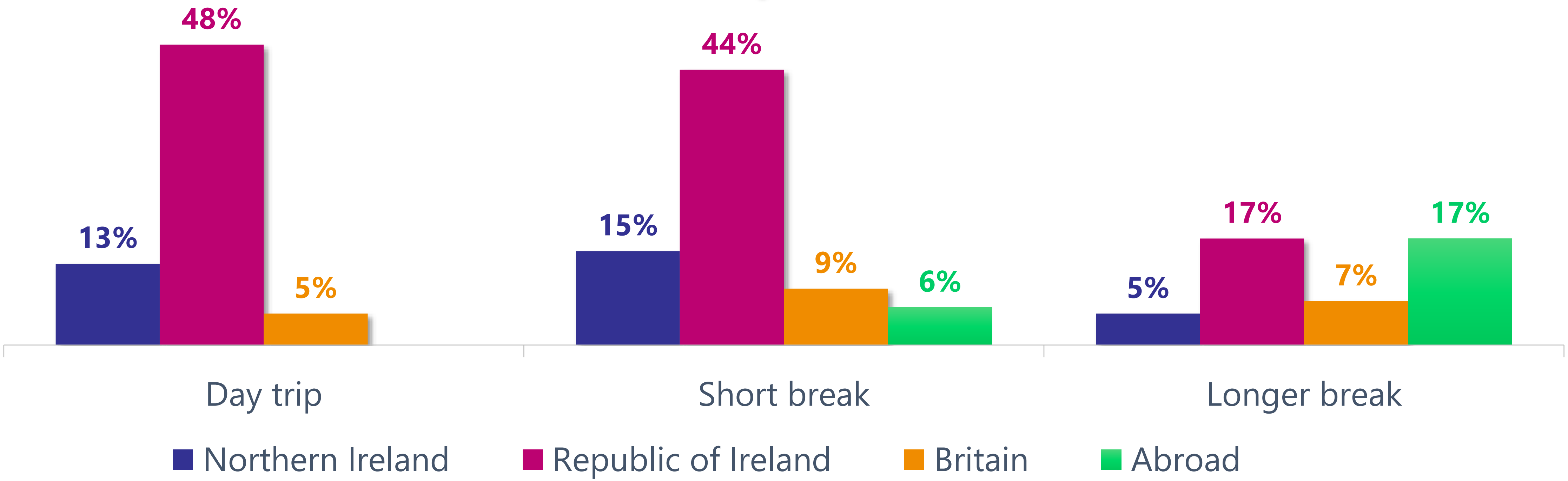
Base n = 56 (caution low base)

D8a. Thinking about your recent trip(s) in Northern Ireland, how would you rate the following aspects?

Travel Intent

Many considering day trips & short breaks to ROI (and to a lesser extent NI) this year – **good to focus on these**

Intentions of Taking a Break this Year



Base = 750

Multiple Questions

Positive signs re short break consideration for rest of the year – **drive these where possible in Autumn/Winter**

Intention on taking a break to Northern Ireland in next 3 years

30% Leisure day trip

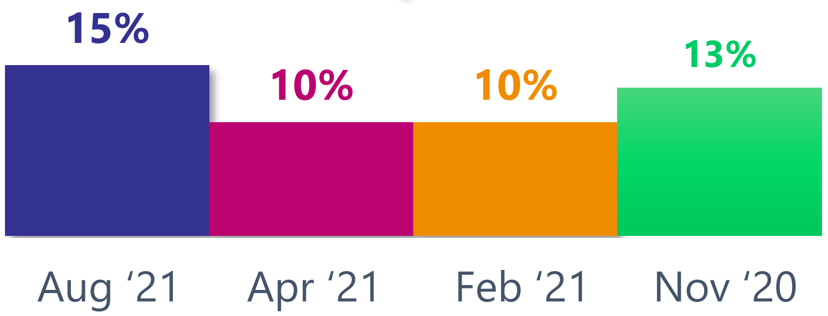
32% Short break

13% Long break

Consideration of break in Northern Ireland in next 3-4 months

(slightly different to prev waves: 'intention of break this year')

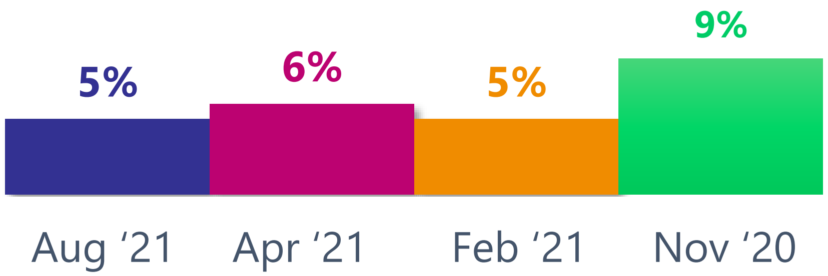
Short Break to NI



Of those planning short trips, **45%** actively planning (7% total sample)

Short trip intentions higher with **Active Maximisers** (22%) and **Indulgent Relaxers** (20%)

Long Break to NI



Of those planning long trips, **33%** actively planning (2% total sample)

Long trip intentions higher with **Active Maximisers** (9%)

E1a. Do you intend to take any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3 years? / E1a. Do you intend to take any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3 years? / E1b. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in the next 3-4 months? / E1c. Would you consider taking a short break of at least 1-3 nights in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3-4 months? / E1d. Would you consider taking a longer break of at least 4 or more nights in the Republic of Ireland, Northern Ireland or elsewhere abroad in the next 3-4 months?

Base (n) = 750 / 112 / 41

Short break plans focus mainly on September and October – prepare for **higher volumes** around this time

Note: Previous waves assessed **intent** rather than **consideration** so uplift may be explained by this

N =750

15% considering taking a short break in Northern Ireland

W4: 9% W3: 10% W2: 13% W1: 13%

How much of your short trip have you planned?

N =112

I have booked	Actively planning	Intend to start planning later	May or may not plan
13%	32%	28%	28%

45% are actively planning a trip to NI – **7%** of the total sample

N =112

***Consideration of short breaks to Northern Ireland in:**

September	October	November	December
24%	**25%**	**16%**	**18%**

15% 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?

Lower number **actively planning** long breaks – those looking to plan later in the year need to be encouraged to book

Note: Previous waves assessed **intent** rather than **consideration** so uplift may be explained by this

N =750

5% considering a long break in Northern Ireland
W4: 5% W3: 5% *W2: 9% W1: 6%*

How much of your longer trip have you planned?

N = 41 – caution low base size

I have booked	Actively planning	Intend to start planning later	May or may not plan
7%	26%	39%	28%

33% are actively planning a trip to NI – 2**%** of the total sample

N = 41

*Consideration of <u>longer breaks</u> to Northern Ireland in:

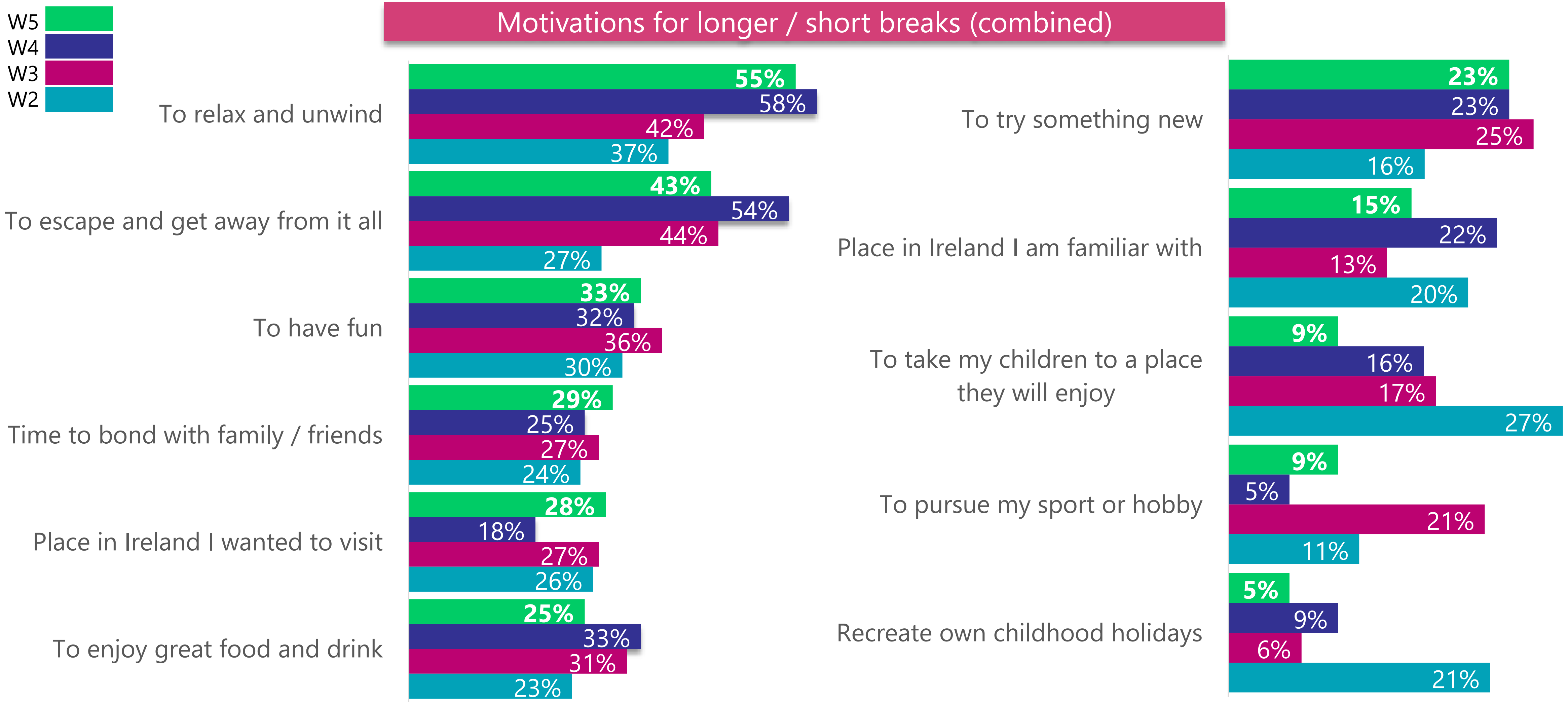
September	October	November	December
22%	22%	14%	11%

31% 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?

Relaxation still the key reason for breaks – messaging focused on this will resonate



Base = 93

E4. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the short trip?

Most are booking **less than a month** before their trip – would be good to delve deeper into planning habits

When researched / booked

	Started researching	**Booked**
Less than a month before	46%	53%
1-2 months	28%	25%
3+ months	27%	22%

Who travelling with (long & short combined)

56%	Partner / spouse
34%	Immediate family
34%	Friends

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

Medium-sized hotels	**42%**
Larger hotel (100 + rooms)	**34%**
Small hotels (21 – 50 rooms)	**31%**
Airbnbs	**28%**
Self-catering	**17%**
Family hotels (1 – 20 rooms)	**15%**
B&Bs	**14%**

- Shorter breaks more likely to be with **spouse**, longer breaks more likely to be with **family or friends**
- Shorter breaks more likely to be in **medium hotels** / Airbnbs; longer breaks more likely to be **large hotels** / B&Bs

Base = 93 (intend on travelling to NI) / 50 (booked/travelled to NI)

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 for this summer in Northern Ireland. How far in advance of the trip did you...

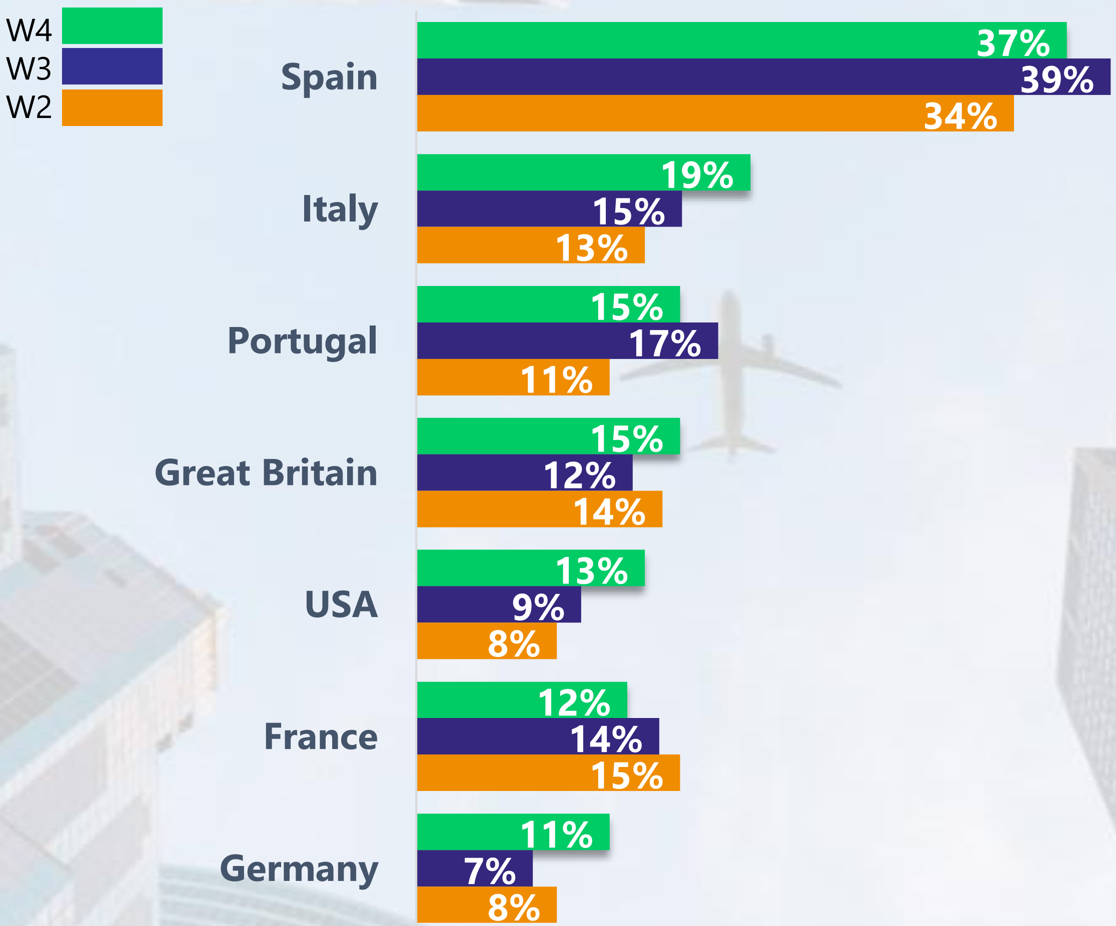
Spain still the top destination for travel abroad, but generally intentions lower than trips in ROI / NI

17% of total sample are considering a break abroad in 2021…

44% of this cohort are actively planning or have booked this

In April, **24%** of total sample were planning on a break abroad – significant drop with summer behind us

Destination abroad intending on travelling to



Base = 137 – Intending on travelling abroad

Showing 10% or higher only

E14. You mentioned that you intend on taking a break abroad in 2021, have you booked or thought about planning this trip abroad?/Q21. Where abroad have you booked/are you planning a trip?

Market Comparison

Travel Intent

ROI travellers to NI booked their trips later than NI residents – worth delving into habits / effect of Covid here

Booked a month beforehand or later: ROI **53%**, NI **39%**

Relaxation by far the key motivator for travelling to NI across both markets

ROI residents are more likely to be planning a staycation within ROI than NI residents within NI

Consideration: ROI Residents 57% VS NI Residents 41%

*holiday within your own country

Events

Market Comparison

Events

Not a big difference between NI and ROI residents when it comes to perceived safety of events

NI residents more likely to consider large outdoor events safe (47% vs. 43% ROI) but generally similar view of safety

But NI residents more likely to be considering an event this year

40% of NI residents considering an event vs. 31% of ROI residents – unsurprising with NI further ahead in loosening restrictions