Consumer Sentiment Analysis Covid-19 17 June 2020





Consumer sentiment summary

- Consumer travel intentions suggests a more optimistic outlook is emerging, particularly in relation to domestic short breaks where half of NI and ROI consumers are planning a short break in Ireland
- However the pandemic is already having or will have a significant financial impact on the majority of households
- To escape, relax and have fun are what people simply want to do on their future break as long as they can do it safely

NI Residents

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Consumer mood has been predominantly negative and concern levels are high with the pandemic having a significant financial impact on the majority of people

- 29% indicate that Coronavirus has already had an impact on their household income and a further 28% state that whilst Coronavirus hasn't yet had an impact on their household income, they expect it to in the future – 57% impacted
- Just over a third (34%) state that Coronavirus will have no impact on their household income with the 65+ age band and those in socio-economic groups ABC1 state are less impacted than average
- A third of NI consumers are largely confident in taking the required safety precautions (32%) and **over three quarters** are carefully adhering to best practice behaviours such as social distancing and appropriate hygiene (78%).



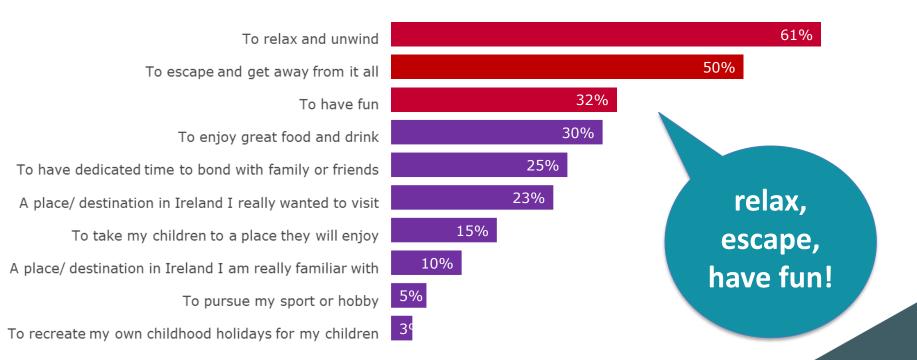
Short break intention has picked up slightly with half (51%) of consumers across the Island of Ireland now planning a trip in Ireland.

- By comparison, intentions for longer breaks show no movement, likely due to household finances being impacted and caution on decisions made on sun holidays
- Whilst there is a lack of international bookings has not translated into an uptake as regards domestic bookings in Ireland
- Many people are extending their short breaks from 2/3 nights to 4 nights.

The most important reasons for taking either a short or long trip for consumers in NI and ROI

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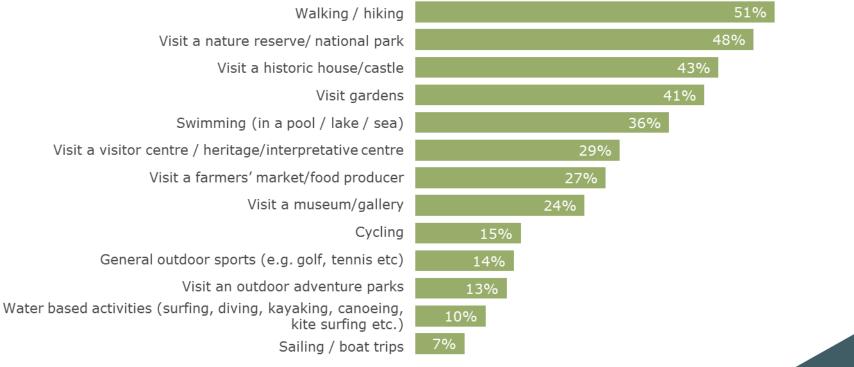
TNI/ Failte Ireland Covid-19 consumer sentiment research - 29 May to 3 June

What will they want to do?

For those who intend to take a short trip in NI or ROI, 'escaping to the country' and historical and cultural visits are high on the list

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Comfort levels

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How NI consumers feel about engaging in the following activities in the up-coming weeks:

Using Public Transport Going On Holiday In Ireland Going On Holiday Abroad Eating At Restaurants / Cafés Going To A Pub / Bar Shopping (other Than Grocery Shopping) Going To An Outdoor Festival Working Outside The Home Visiting Indoor Attractions (museum / Gallery etc.) Activities Involving Hiring Equipment (e.g cycling, kayaking etc.) Bus Tours

Nervous/ very	At ease/ completely at
nervous	ease
58%	16%
37%	33%
54%	20%
54%	19%
59%	18%
32%	33%
56%	12%
27%	34%
48%	23%
33%	26%
57%	13%

TNI/ Failte Ireland Covid-19 consumer sentiment research - NI data - 29 May to 3 June

Comfort levels

Clear implementation of hygiene measures and social distancing enforcement are the key actions that would make NI consumers feel most comfortable about visiting **attractions** when they reopen:

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Hand sanifiser at entrance and around the premises	65%
Limiting the number of visitors on the premises at one time	64%
Social distancing queues at the entrance and around the premises	61%
Staff visibly cleaning surfaces, utensils, machinery etc.	43%
All staff wearing masks and gloves	34%
Taking the temperature of all visitors on entering	34%
Making it compulsory for customers to wear masks	29%
Pre-booking times	26%
Maximising distance from staff	22%
Notices around the premises reassuring visitors about cleaning and other measures in place	20%
Hygiene standard certification	18%
Notices on the website about special measures in place on the premises	12%

TNI/ Failte Ireland Covid-19 consumer sentiment research - NI data - 29 May to 3 June

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- The latest results for the **UK Covid-19 Consumer Tracker** report for the period 1-5 June indicate that sentiment towards travel appears to be improving slightly
- 28% consider themselves fairly or very confident they would be able to take a holiday or short-break during the peak July/August period this year
- The main reasons driving this relative lack of confidence are again led by restrictions on travel by government (52%), fewer opportunities to eat or drink out (51%) and concerns about catching Covid-19 (45%)
- For the summer period, countryside/village and traditional coastal/seaside town destinations lead with 31% and 30% shares respectively
- Cities move into second place for trips scheduled from October onwards with hotels/ motels and inns the preferred accommodation type.