Tourism Northern Ireland Consumer Sentiment Research

ROI Market – Wave 13 (October 2023)

SPARK
The Strategic Insight Agency

TOURISM NORTHERN IRELAND

Research background

Research background & objectives

This is the **13th wave** of our consumer sentiment research for the Republic of Ireland. We have continued to look at consumer attitudes towards travel to NI and elsewhere, keeping an eye on how things have changed throughout 2023 and travel intentions looking ahead.

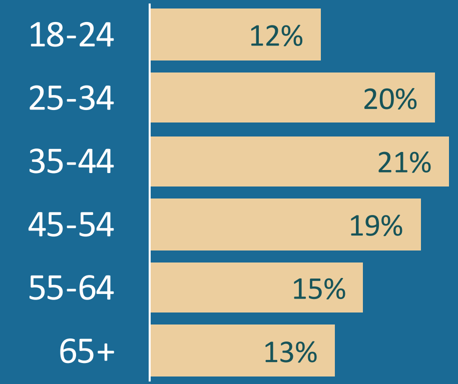
The research objectives:

- Understand recent travel experiences in NI
- Explore current attitudes towards travel
- Assess current attitudes towards travel in NI, ROI and further afield
- Understand attitudes, and impact of plans for travel, in light of cost-of-living increases

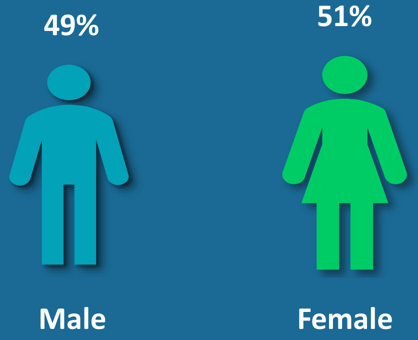
Sample - We spoke to a robust, nationally representative sample in the Republic of Ireland

Full sample n=748

Age

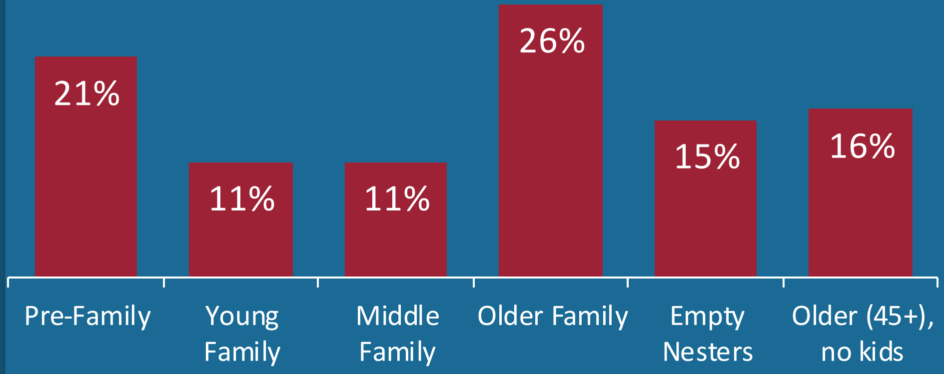


Gender

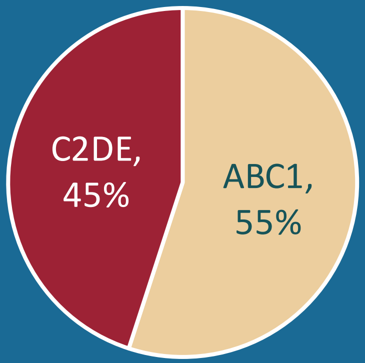


1% describe in another way

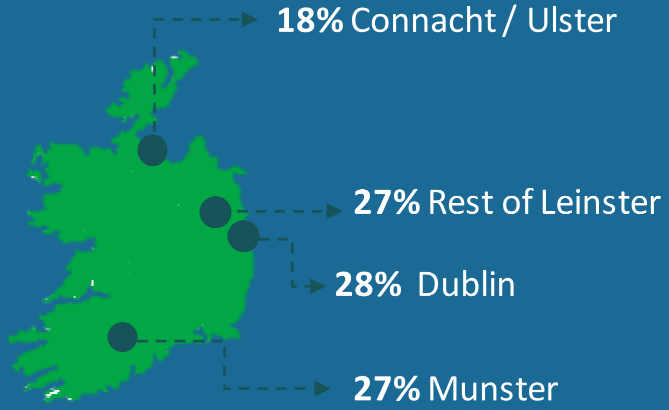
Lifestage



Socio



Region



Fieldwork was conducted between 13 September and 27 September 2023

Key takeaways

Experiences of trips in NI have been very positive throughout 2023

- ROI visitor volumes remain stable in 2023. Of those who took trips, most had very good experiences - 9 in 10 saying their expectations were met or exceeded.
- Range / choice of places to eat out and things to see & do driving these positive scores.

Encouraging to see trip intentions are stable

- Trip intentions for the coming months and into early 2024 are broadly stable compared to this time last year, while intentions for trips within ROI drop significantly.
- Among those planning trips, relaxation and fun remain the key reasons to travel, although events increase in importance as a factor.

Impact of cost-of-living concerns and increased trip abroad intentions continues

- Cost-of-living concerns remain high - 90% expecting to be affected to some degree by cost-of-living increases.
- NI value for money score (VFM) drops. However, consumers continue to rate NI as better VFM than ROI and GB. Competition from abroad remains strong however, as both Spain and Portugal have surged even further ahead in terms of being perceived as VFM destinations.

Travel experiences

1 in 5 in ROI have taken a trip to NI, with very few taking long breaks

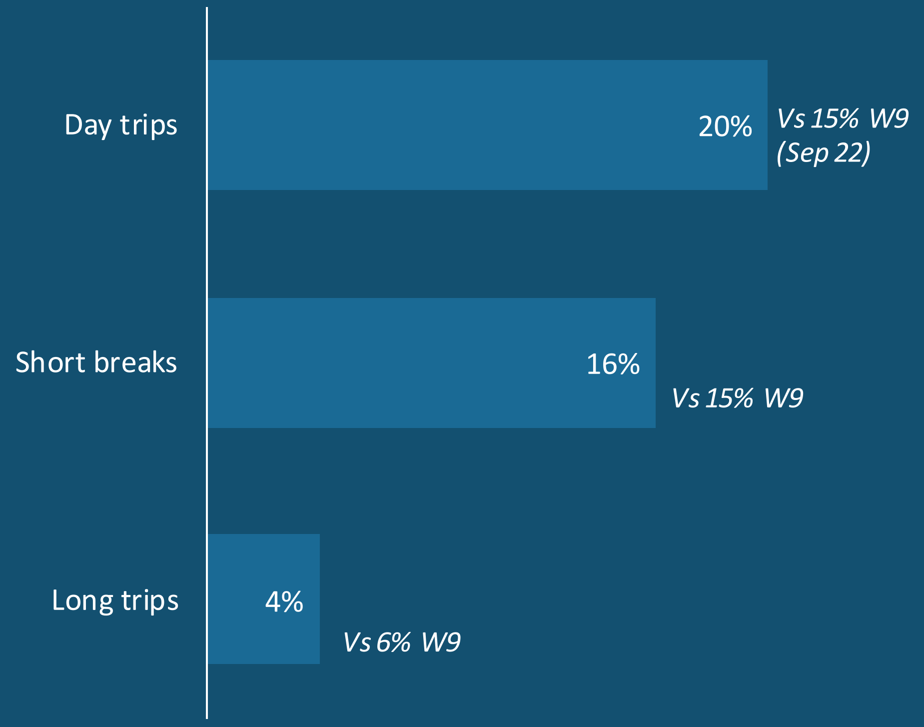
19%

have taken a **short or long break** in NI in 2023

18 – 34 more likely to have visited NI – 23%

45% of total said they were first time visitors

% of total sample who took a trip in NI



Other than NI…

45% took a break in ROI
Vs 52% in W9

41% went abroad
Vs 36% in W9

18% didn't travel at all
Vs 26% in W9

N = 748

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 2023?

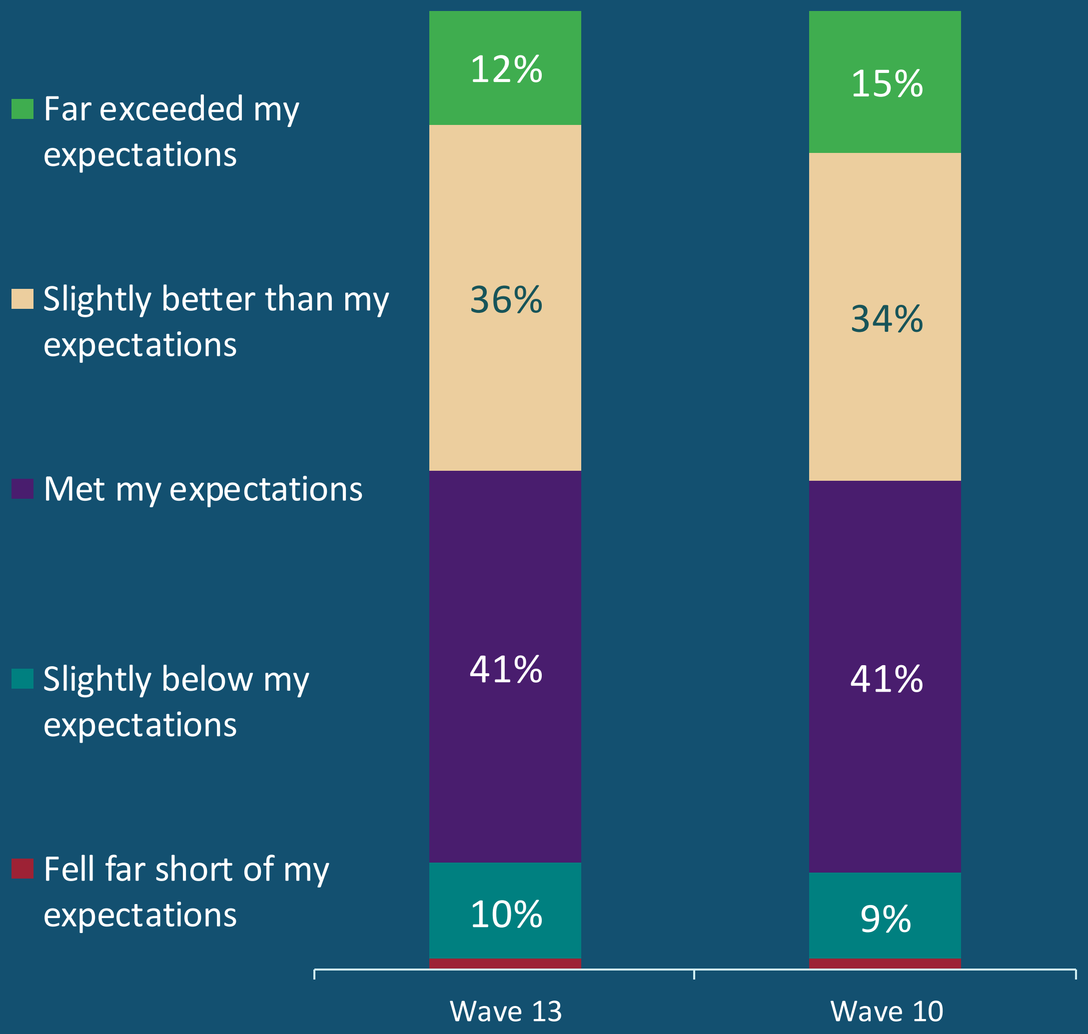
9 out of 10 who travelled to NI had their expectations met or exceeded and almost half said it exceeded their expectations – a similar result to when this was last asked

89%

had their expectations met or exceeded

Vs 90% in Wave 10 (December 2022)

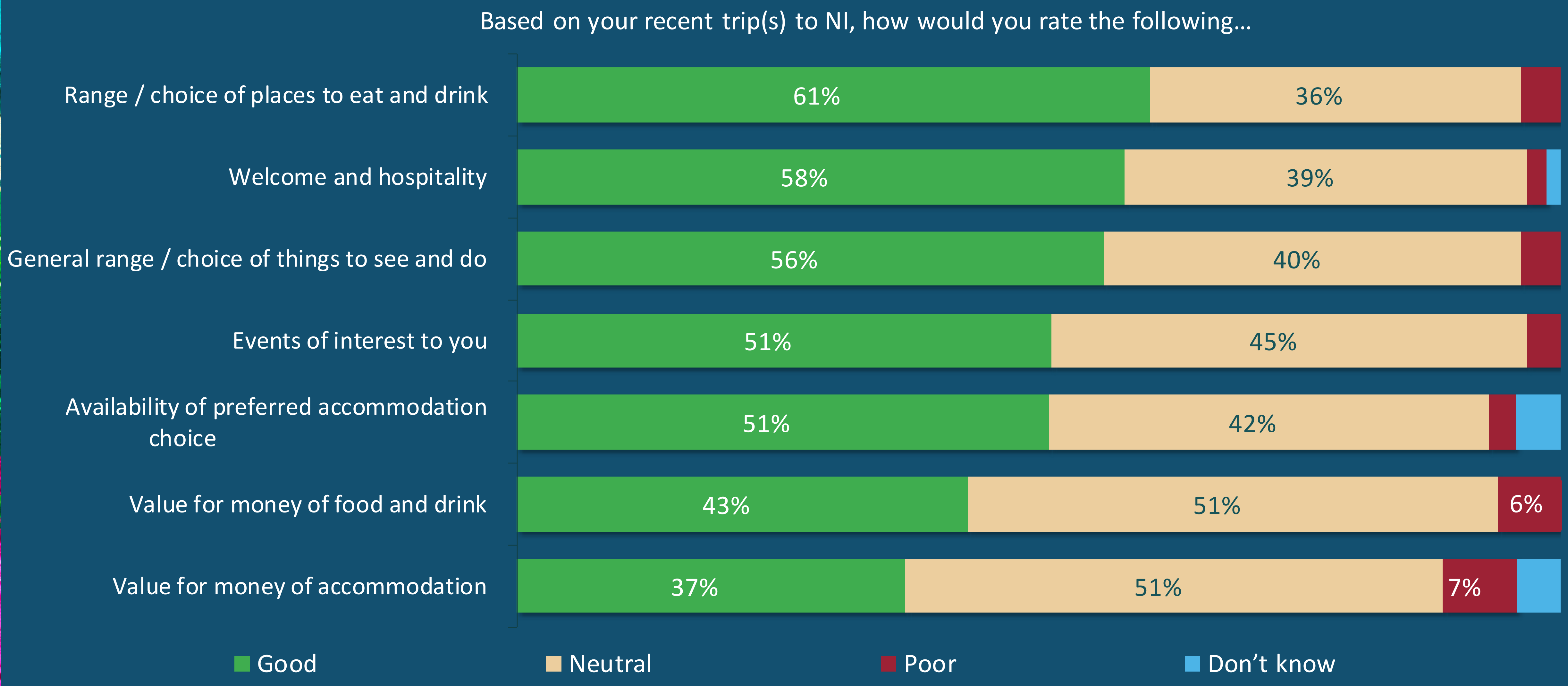
Those who visited NI felt their trip…



N = Those who took day trip, short break or long break in NI

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

All aspects of recent trips rated positively – especially the range of things to see and do / eat and drink.

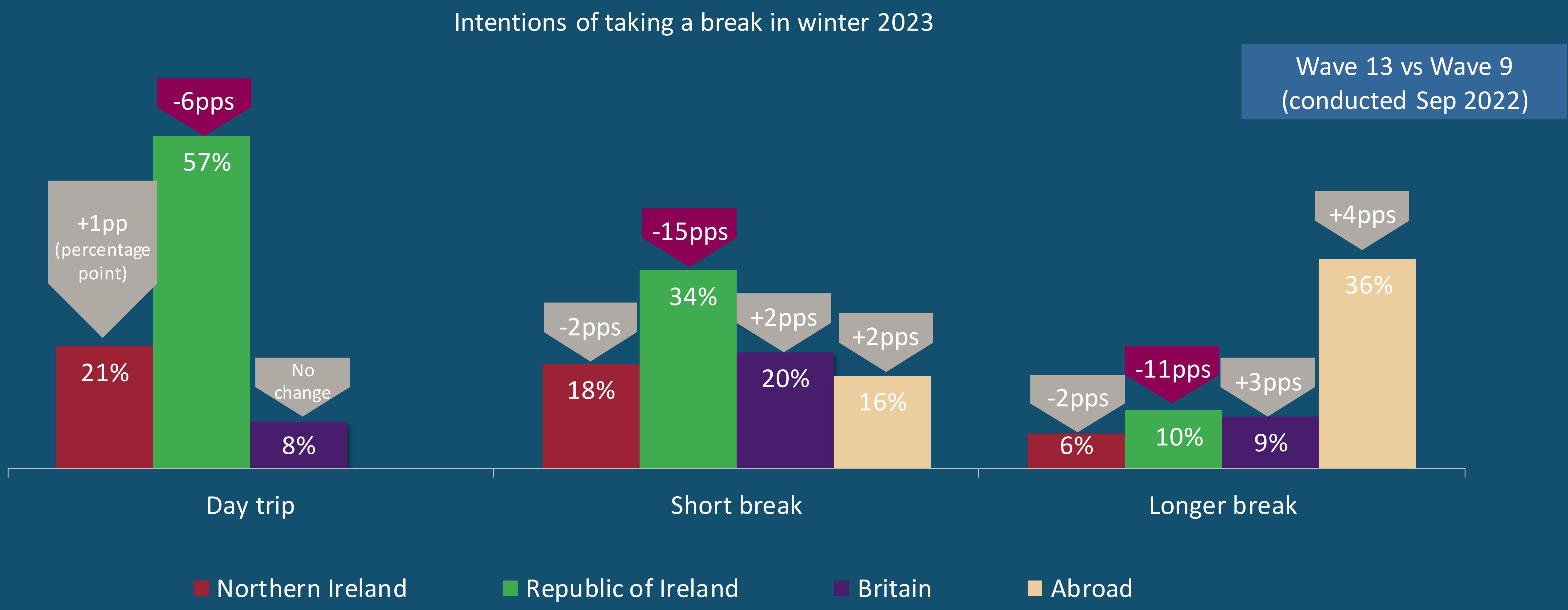


N = Those who took day trip, short break or long break in NI)

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

Travel intent

Trip intentions stable vs. this time last year for NI. Notable decrease for trips within ROI



N = 748

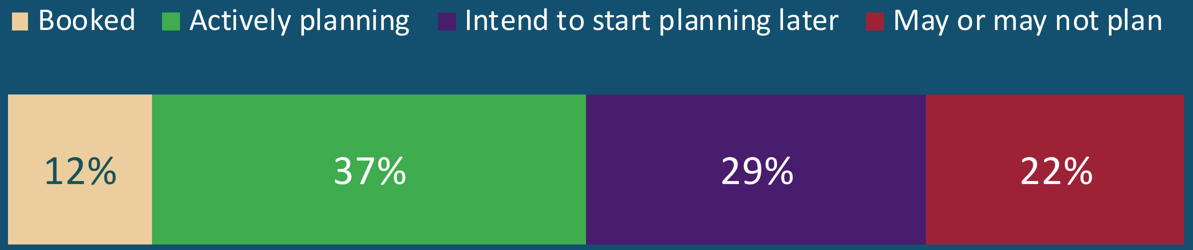
E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the next 3 months (October to December)?

Under a fifth considering short breaks in coming months – marginally less than this time last year. Around half actively planning, with November and December the key time for trips

18%

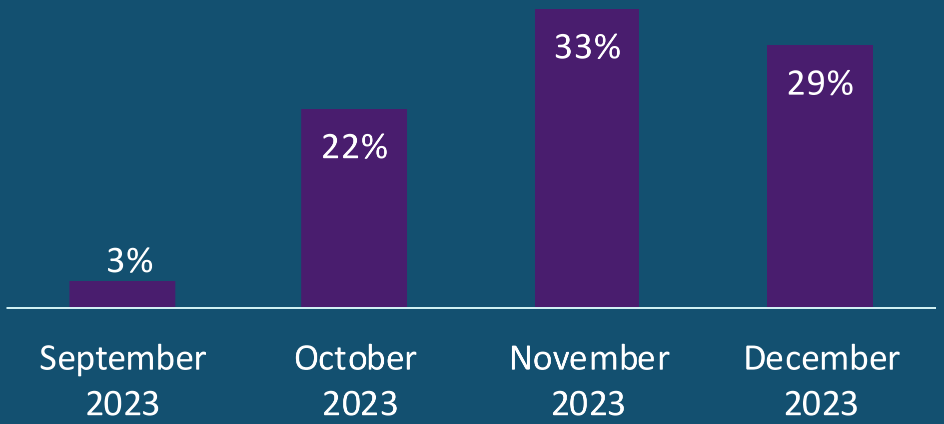
are considering a **short break** in NI in winter 2023

Status of short break – have they booked?



49% are actively planning or have booked a trip to NI – **8%** of the total sample

Short break planned for



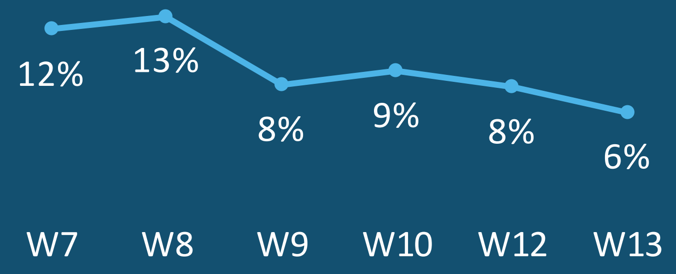
N = 748

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 next 3 months (October to December)? / 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?

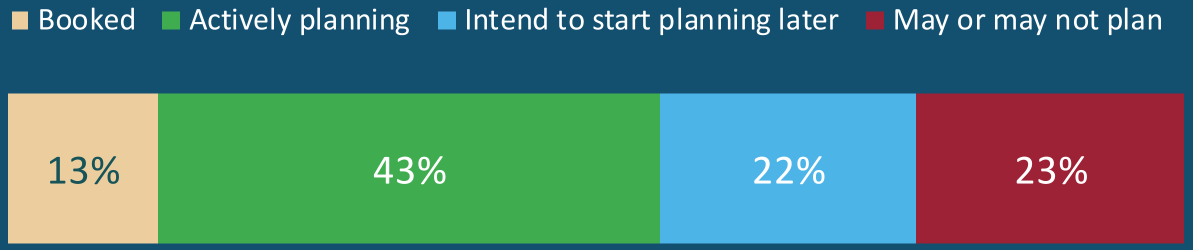
Long breaks are roughly stable when compared to the last few waves

6%

are considering a **long break** in NI in winter 2023

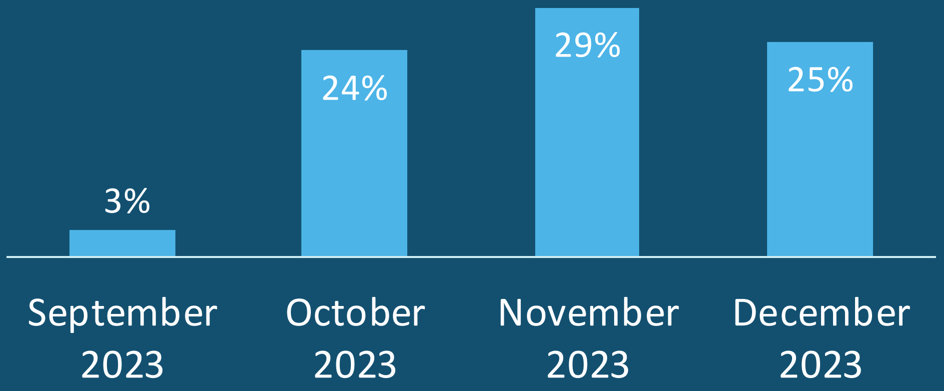


Status of long break – have they booked?



56% are actively planning or have booked a trip to NI – **2%** of the total sample.

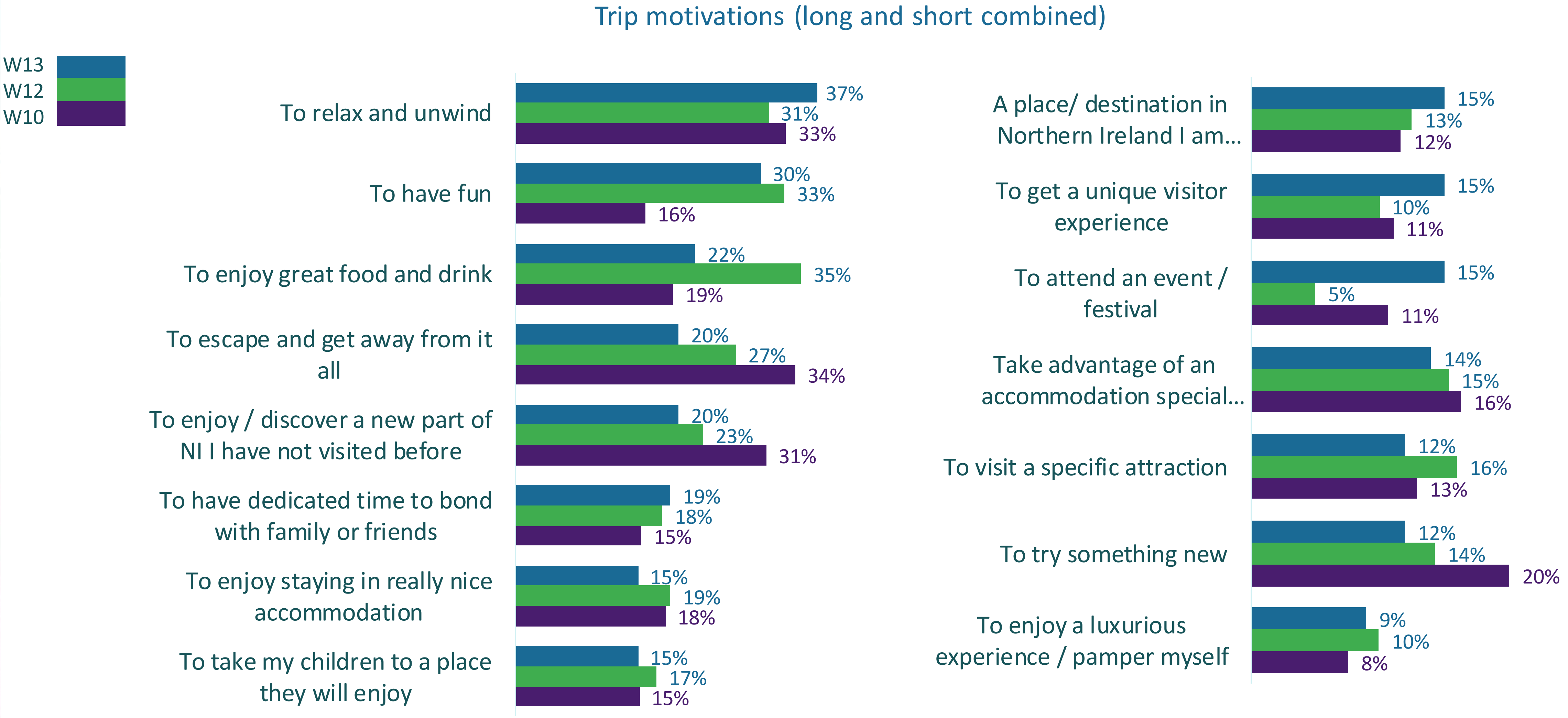
Long break planned for



N = 748

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 next 3 months (October to December)? / 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 and fun remain top priorities for a trip, with attending a festival/event increasing in importance – Halloween / Christmas may be impacting here

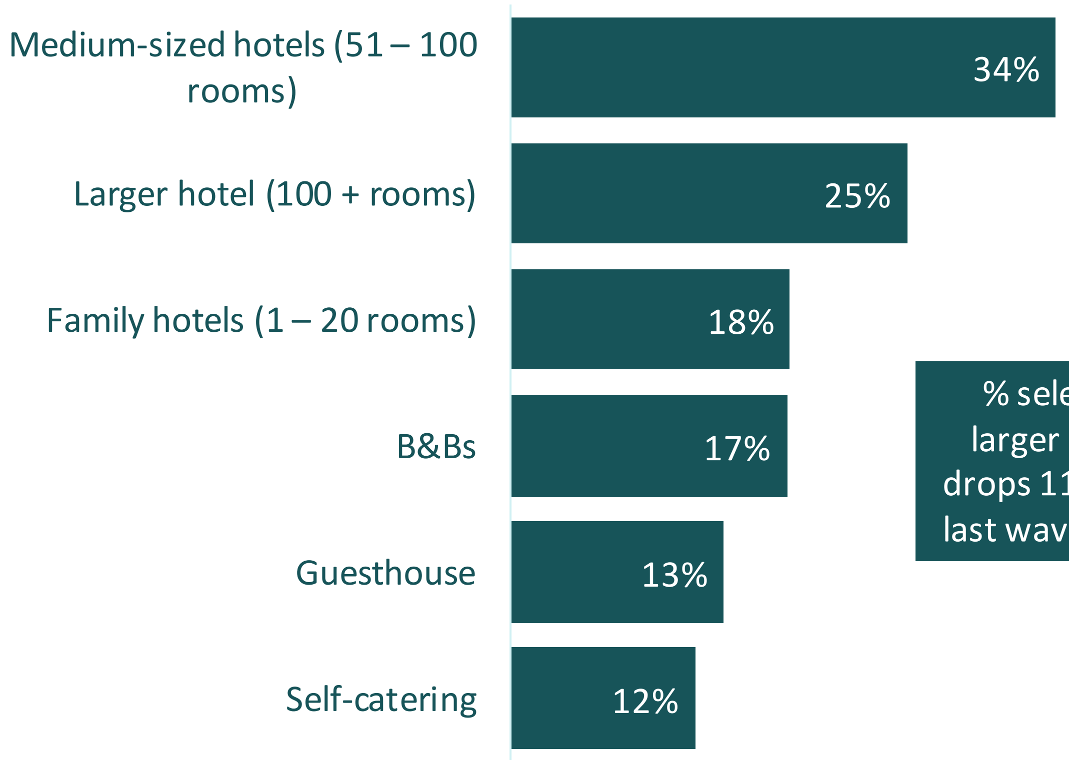


N = Those planning long or short break (excl. "may or may not plan")

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

Large/medium hotels are still top accommodation types; 2 in 5 travelling with their partners, an increase vs. earlier in the year

Where staying (*showing 10% or higher*)



% selecting larger hotels drops 11 pps vs. last wave (April)

Who travelling with

44% Partner / spouse

40% Immediate family — 35-54 – *59%* ↑

26% Friends — 18-34 – 38% ↑

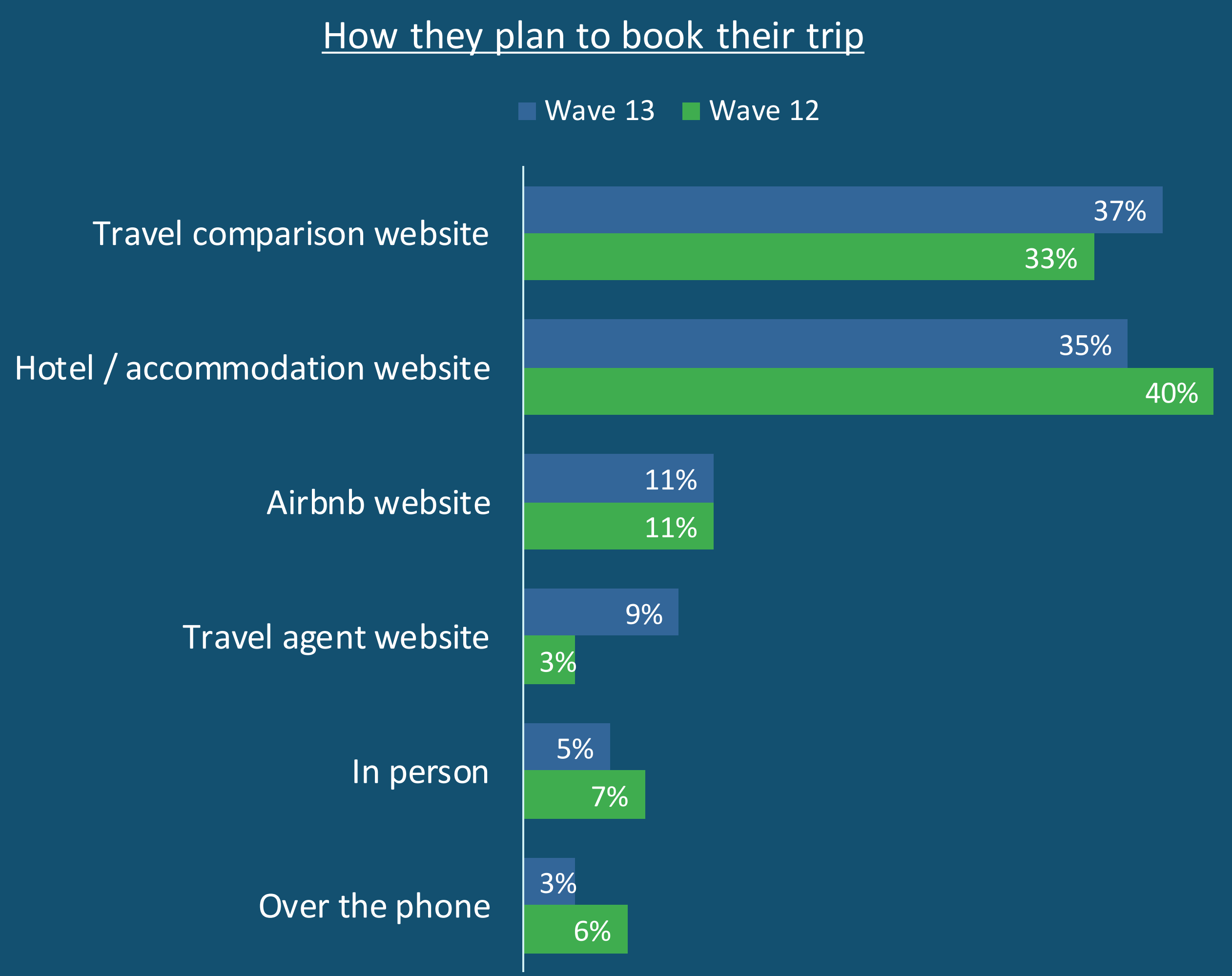
Partner / spouse increases vs. last time – was 36%. Immediate family drops.

↑ ↓ **Significantly Higher / Lower than Total**

N = Those 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 Ire land, what type of accommodation do you expect to stay in?

Travel comparison sites are the most common form of booking with hotel websites a close second – desire for "deals" may be coming in here



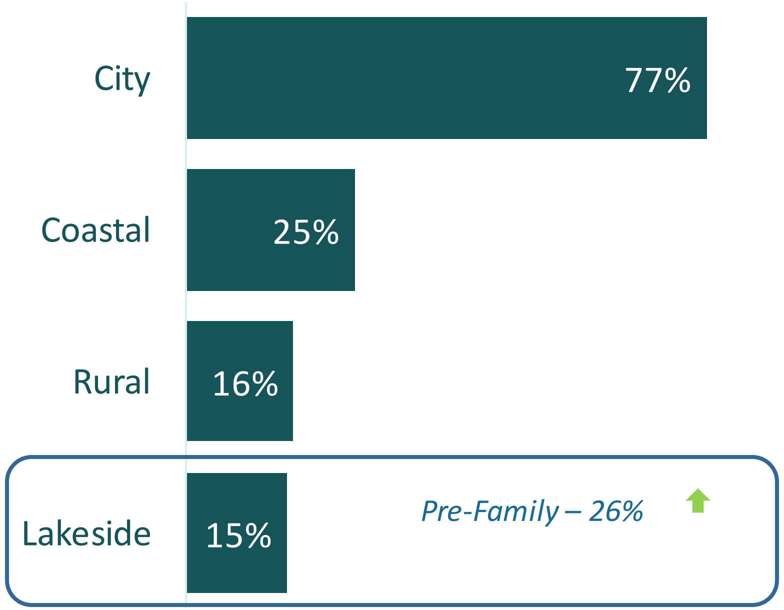
Pre-family are much less likely to book directly on hotel/accommodation websites (15%)
but are much more likely to book in person (14%) and on Airbnb (28%)

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

E8W12. How do you plan to book your upcoming short or long break in Northern Ireland?

City breaks clearly preferred for coming months; desire for laid-back holidays also grows

Type of break preferred



Type of trip preferred

55%	Laid back holiday	18-34 – 41% ⬇ 55+ – 77% ⬆
31%	A bit of both	
14%	Exciting holiday	18-34 – 24% ⬆

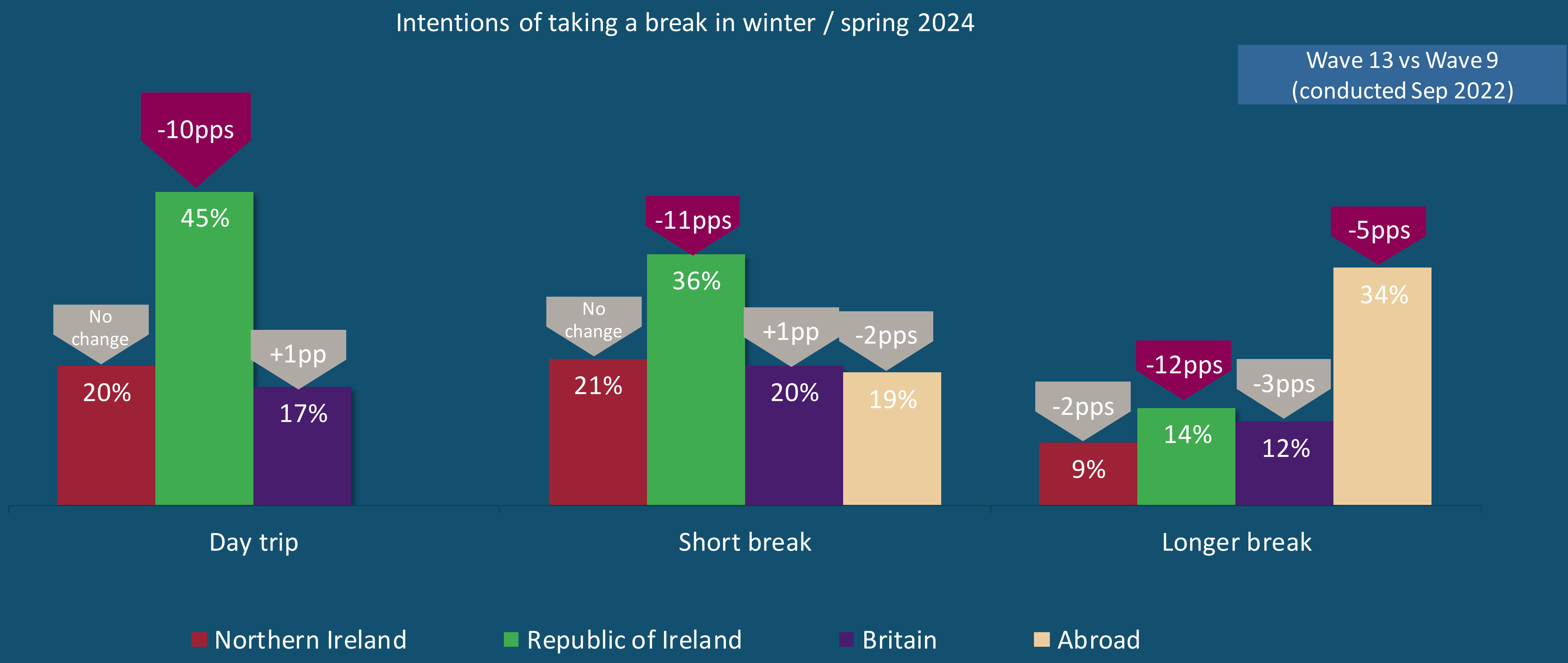
Hierarchies for both are the same as previous wave – slight decrease for exciting holidays (from 21%) and increase for laid back (from 50%)

⬆ ⬇ **Significantly Higher / Lower than Total**

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

E1e. Which of the following destination types would you consider for your next trip in Northern Ireland?/ E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer?

Trip intentions for January to April are also stable – intention to take a trip within ROI dropping significantly

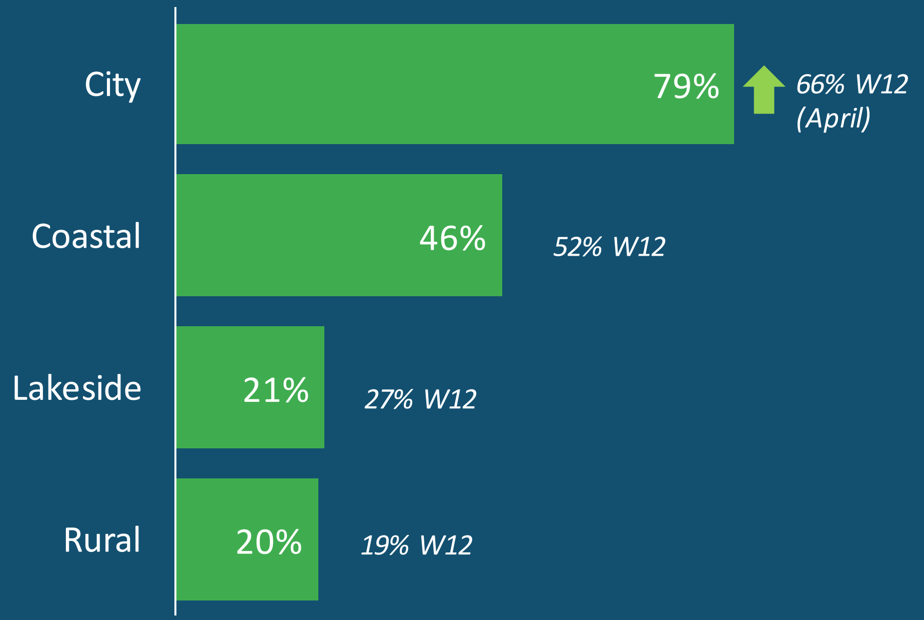


N = 748

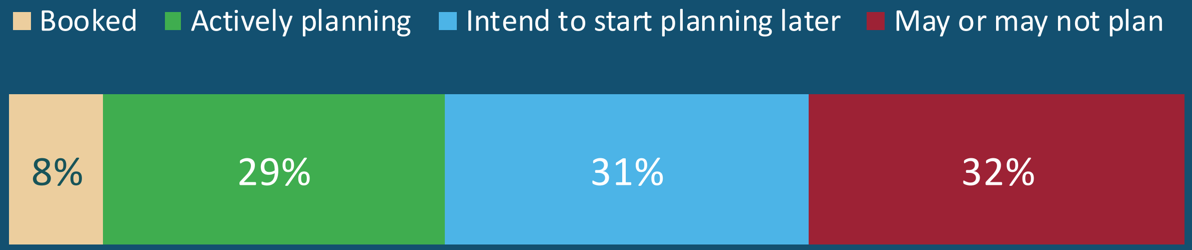
E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in winter/spring 2024 (January to April)?

City breaks are the most popular type of trip, growing significantly from the previous wave

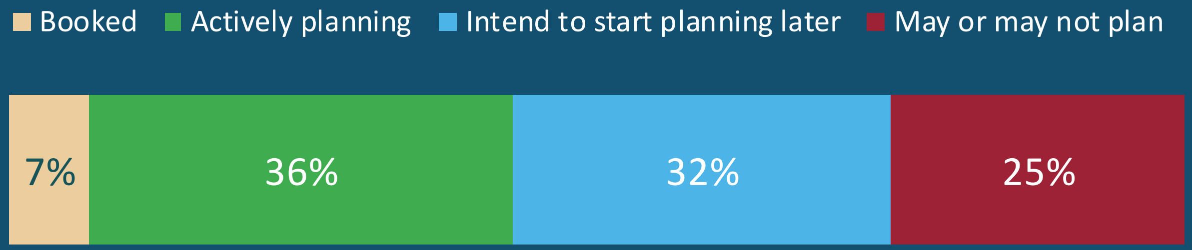
Type of break considered



Amount of short break planned



Amount of long break planned



Significantly Higher / Lower than Wave 12

N = Those considering long or short break destination

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

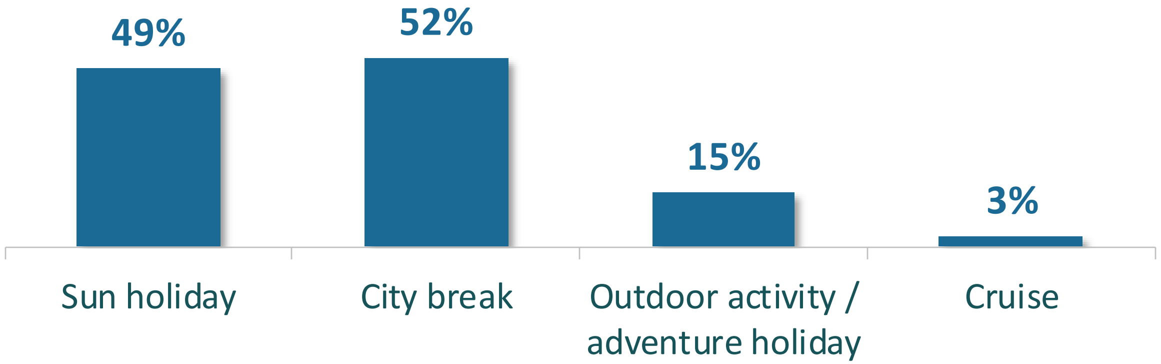
Over half are planning holidays abroad – October, March and April key months for trips abroad with 3 in 5 already booked

54% of total sample are considering a break abroad in the next 6 months

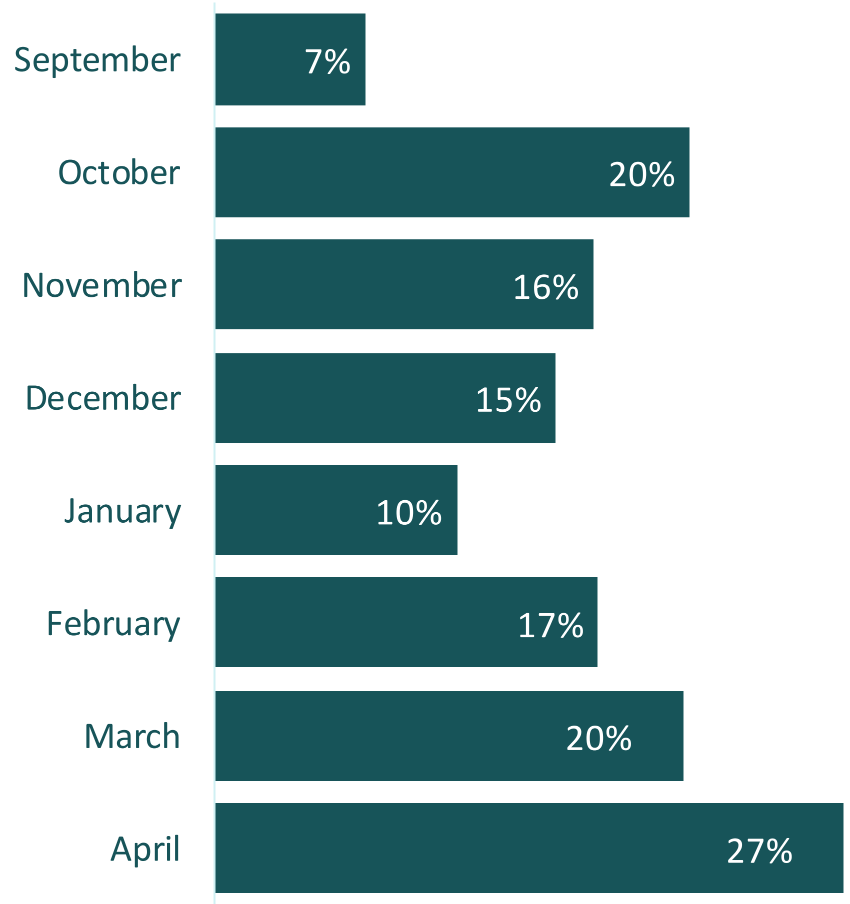
58% of this cohort are actively planning or have booked their trips

A smaller percentage of people have booked or are actively planning a trip abroad compared to the previous wave (67% - likely seasonal) but this figure is slightly up from this time last year (53% W9).

What type of trip are you considering?



When trips abroad are planned for



N = Those considering trip abroad

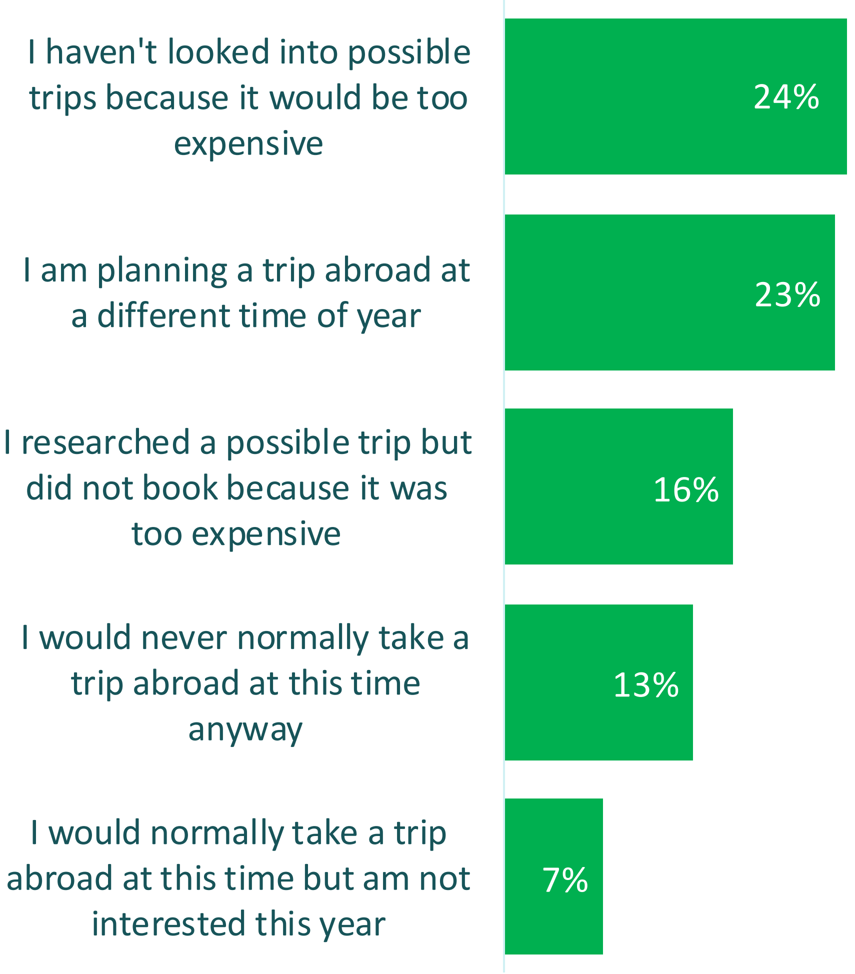
E14. You mentioned that you are considering taking a break abroad in late 2023 / early 2024 (September to April). Have you booked or thought about planning this trip abroad? / E14b And in which of the following months are you likely to take a holiday or short break abroad in late 2023 / early 2024? / E15New. What type(s) of holiday or short break abroad are you considering?

Key trip abroad motivations are relaxation/ escapism, with climate also high on the list. Among those who aren’t going abroad, cost is a key factor as well as season

Trip abroad motivations

The top 6 motivations are consistent with the last wave

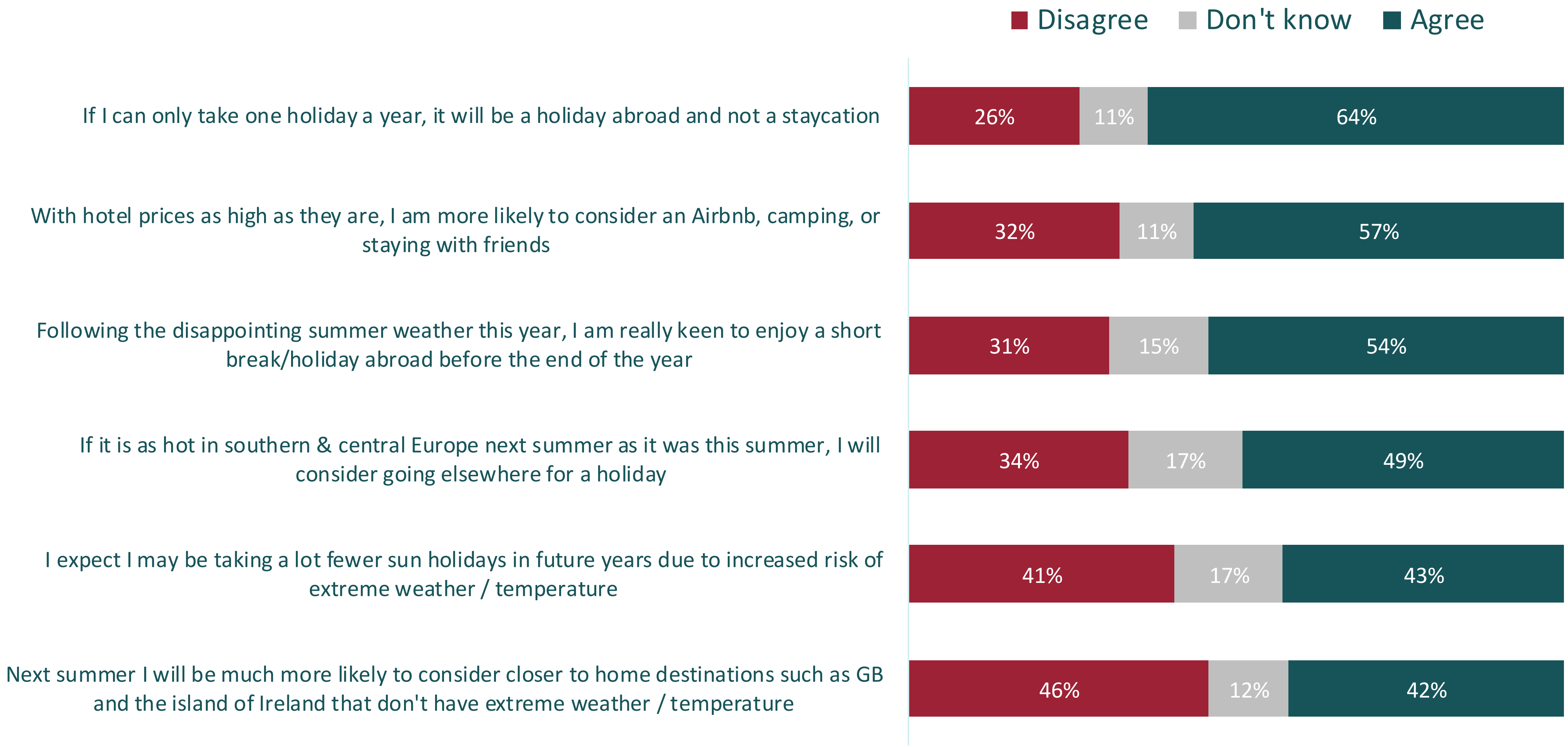
Why not planning trip abroad this autumn / winter / spring



N = Those considering trip abroad / Those not planning

E15bNew. What has encouraged you to consider a holiday or short break abroad in late 2023 / early 2024? / E14c. You mentioned that you are not planning a break abroad in late 2023 / early 2024 (September to April). Which of the following best describes your reasons for not taking a break abroad?

2 in 3 say that if they only go away once next year, it will be a holiday abroad



N = 748

L12 To what extent do you agree or disagree with the following statements?

Market comparison – Trip expectations

ROI intentions to take a trip to NI are broadly stable in comparison to this time last year

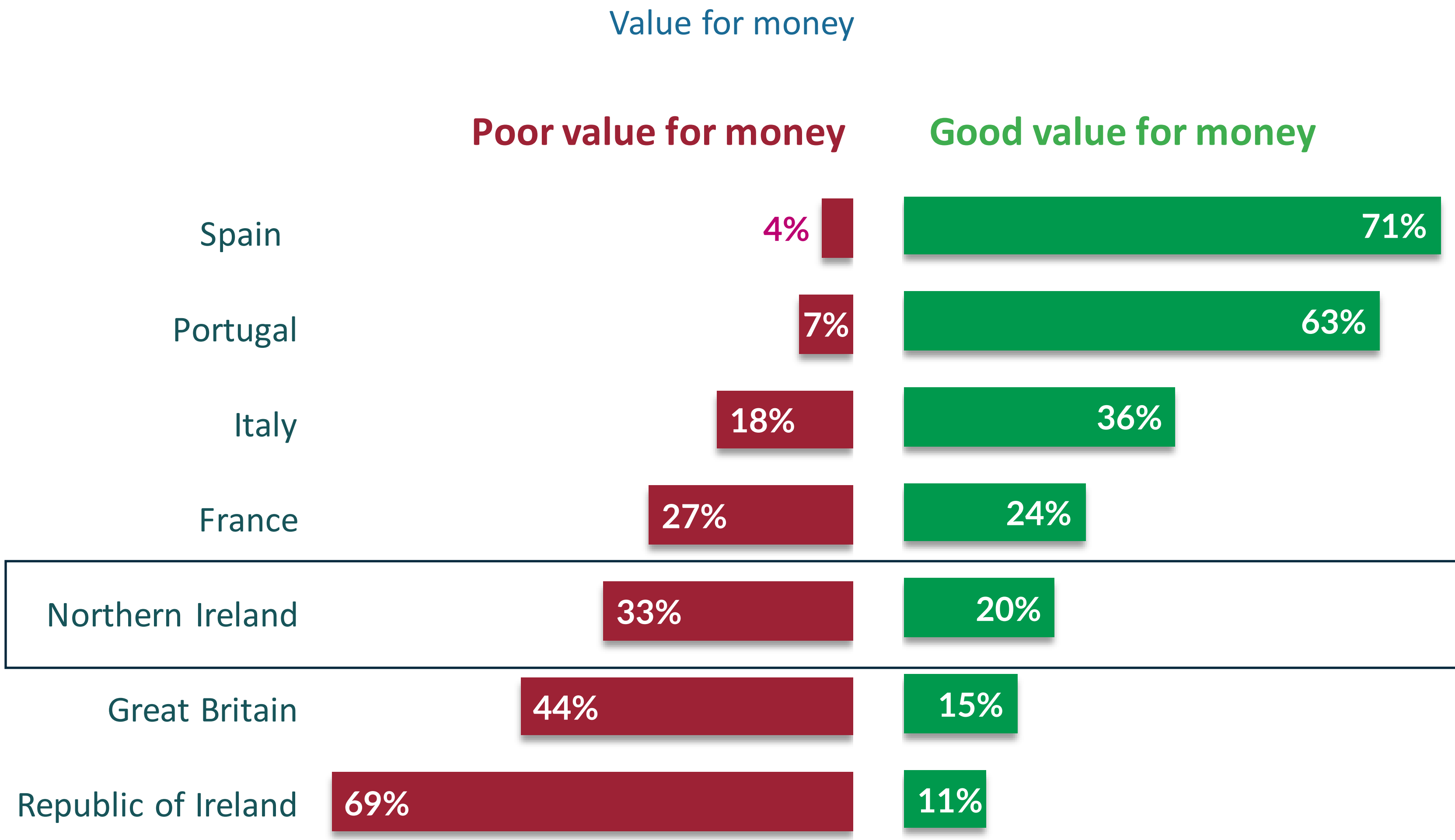
- Travel intentions to NI for January to April 2024 remain positive, in stark contrast to the outlook for ROI domestic trips which have declined significantly
- To relax and unwind and to have fun are key motivators for intended NI trips, with the opportunity to enjoy NI's food & drink experience particularly important for ROI consumers.

Differences in when they plan to travel apparent

- Top month for both long and short breaks in NI among those in ROI is <u>November</u>
- For those in NI, short breaks more concentrated in <u>October</u> whereas longer breaks more so in <u>December.</u>

Value for money

Value for Money scores for NI and competitor locations all drop vs. previous research in April – NI still well ahead of ROI, but behind France now



Net Score

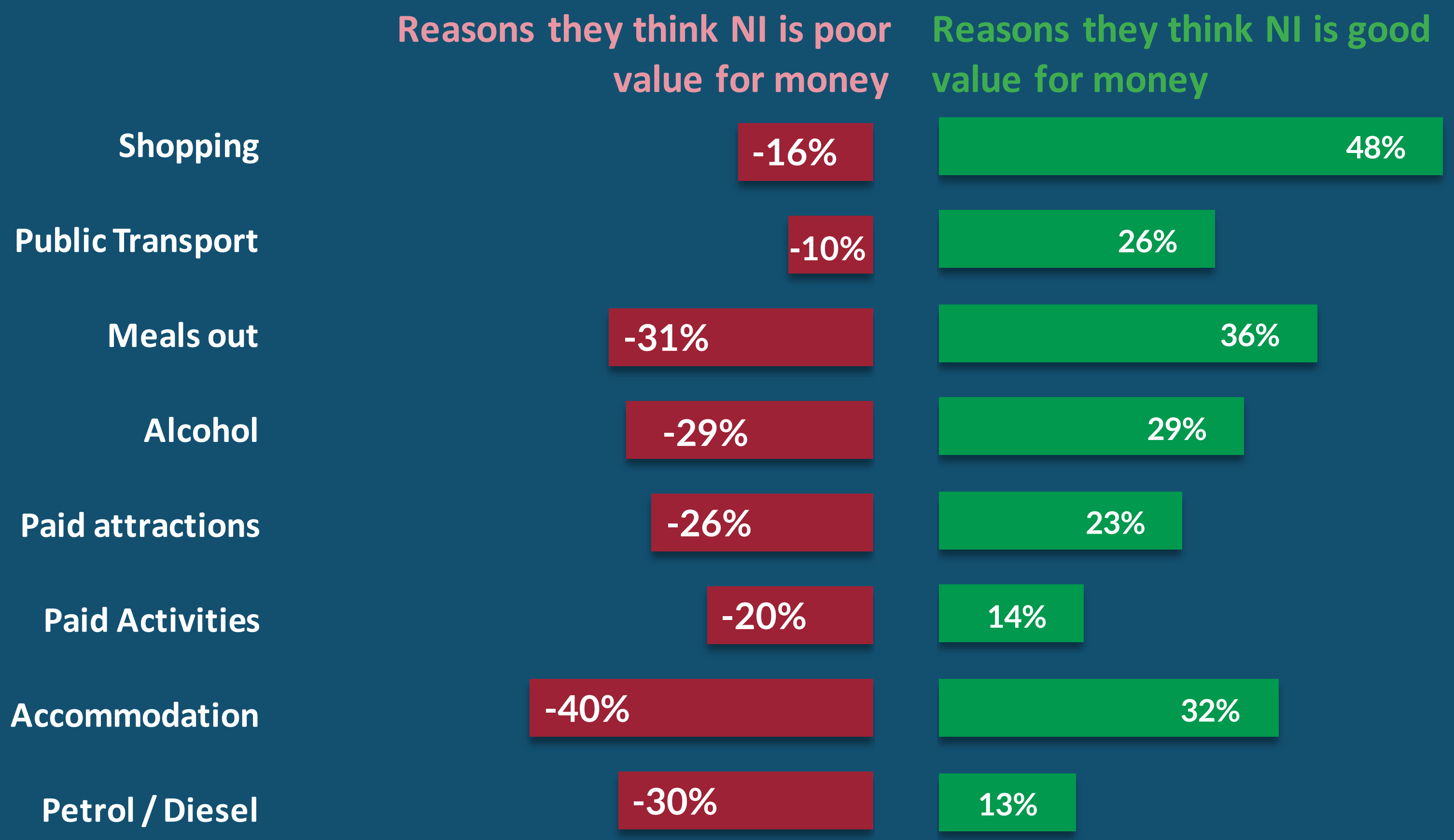
	Sep (W13)	April (W12)	Dec (W11)
Spain	+67	+66	+48
Portugal	+56	+53	+40
Italy	+18	+18	+12
France	-3	-3	-7
Northern Ireland	-13	-3	-14
Great Britain	-29	-21	-31
Republic of Ireland	-58	-47	-48

N = 748

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

Shopping and public transport represent the best net score for value for money within NI – although alcohol VFM score drops

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



Net score

	Sep	April	Dec
Shopping	+32%	+31%	+27%
Public Transport	+16%	+16%	+14%
Meals out	+5%	+5%	+4%
Alcohol	0%	+17%	+19%
Paid attractions	-3%	-2%	-6%
Paid Activities	-6%	-11%	-10%
Accommodation	-8%	-5%	-7%
Petrol / Diesel	-17%		

N = 748

C3. Which of the following do you think represent poor / good value for money when it comes to Northern Ireland as a short break or holiday destination?

Market comparison – Value for money

Improvements in VFM for the NI market but a decrease within the ROI market

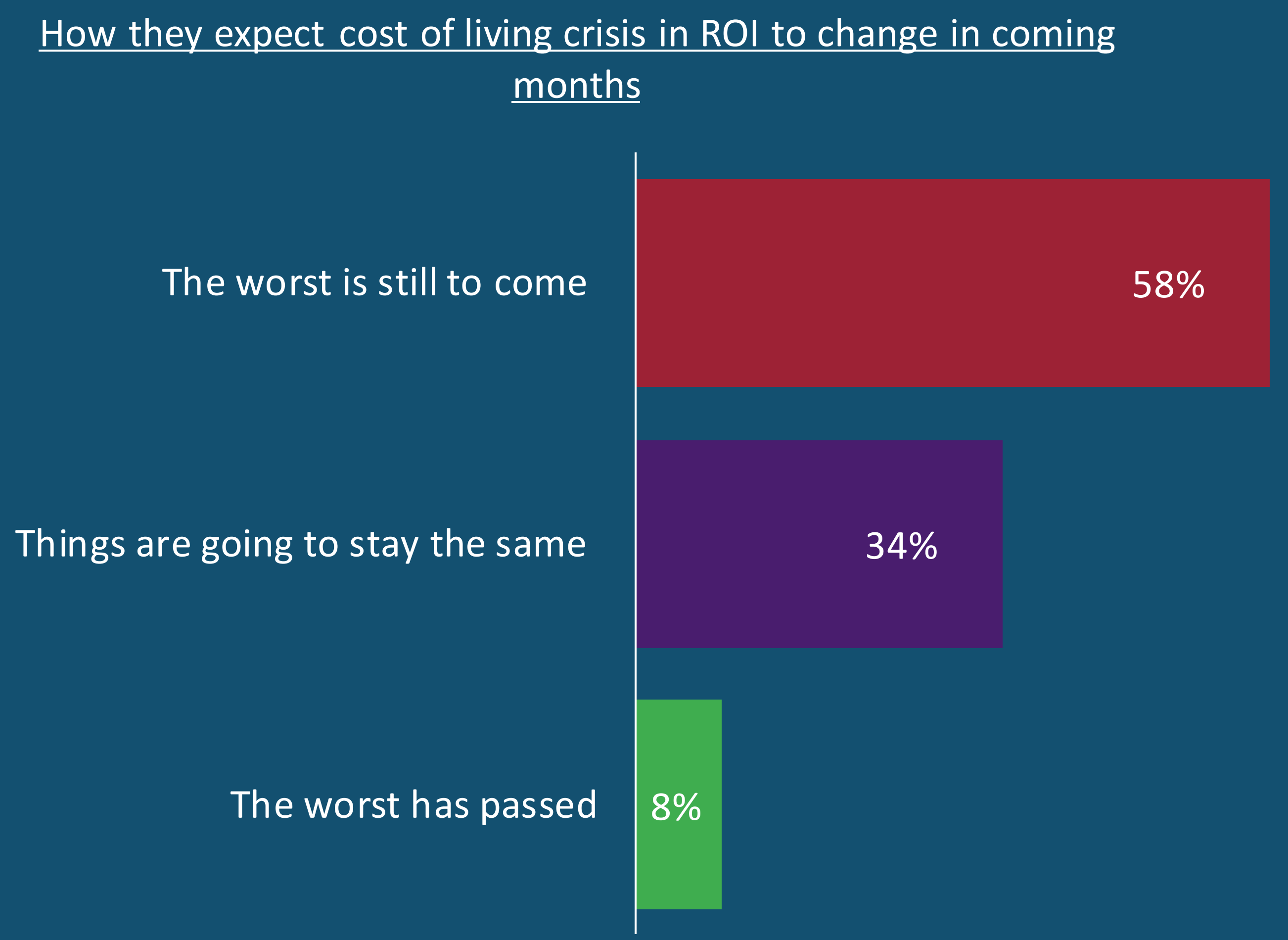
- **Net VFM scores continue to increase for those in NI with a score of +15, compared to a score of -13 in ROI showing a decrease from the previous wave. Both markets continue to see Spain and Portugal as representing the best VFM.**

Accommodation is the main differentiator between both markets

- In NI, accommodation ranks as 3rd in representing good value for money but within the ROI market, it ranks 7th with only fuel ranking lower.

Cost of living

Most are still expecting cost of living situation to worsen in the coming months – less than 10% say that the worst has passed



N = 748

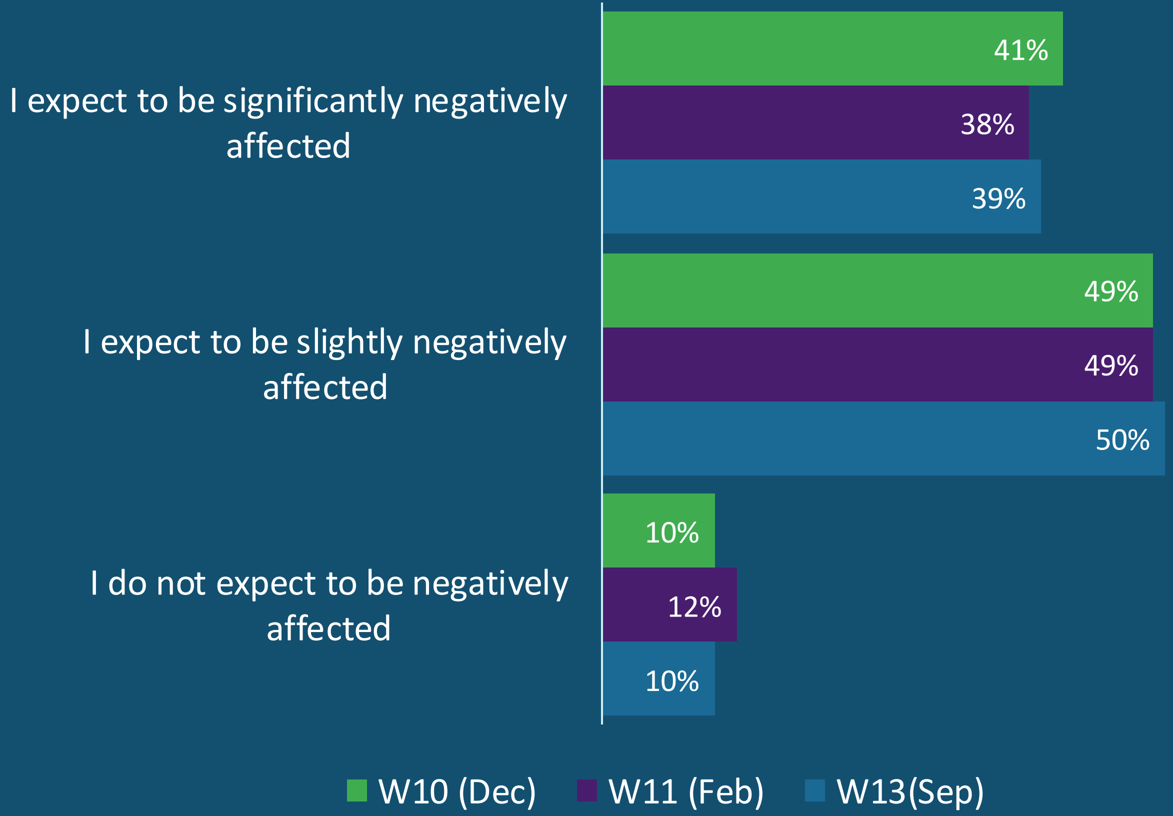
F2 Over the coming few months, how do you think the cost of living crisis is going to change in Republic of Ireland?

Impacts of cost of living continue to affect people in ROI – likely to have continued impact on their spend when it comes to breaks

90%

expect to be affected by cost of living increases

Extent to which people feel they will be financially affected by cost of living increases

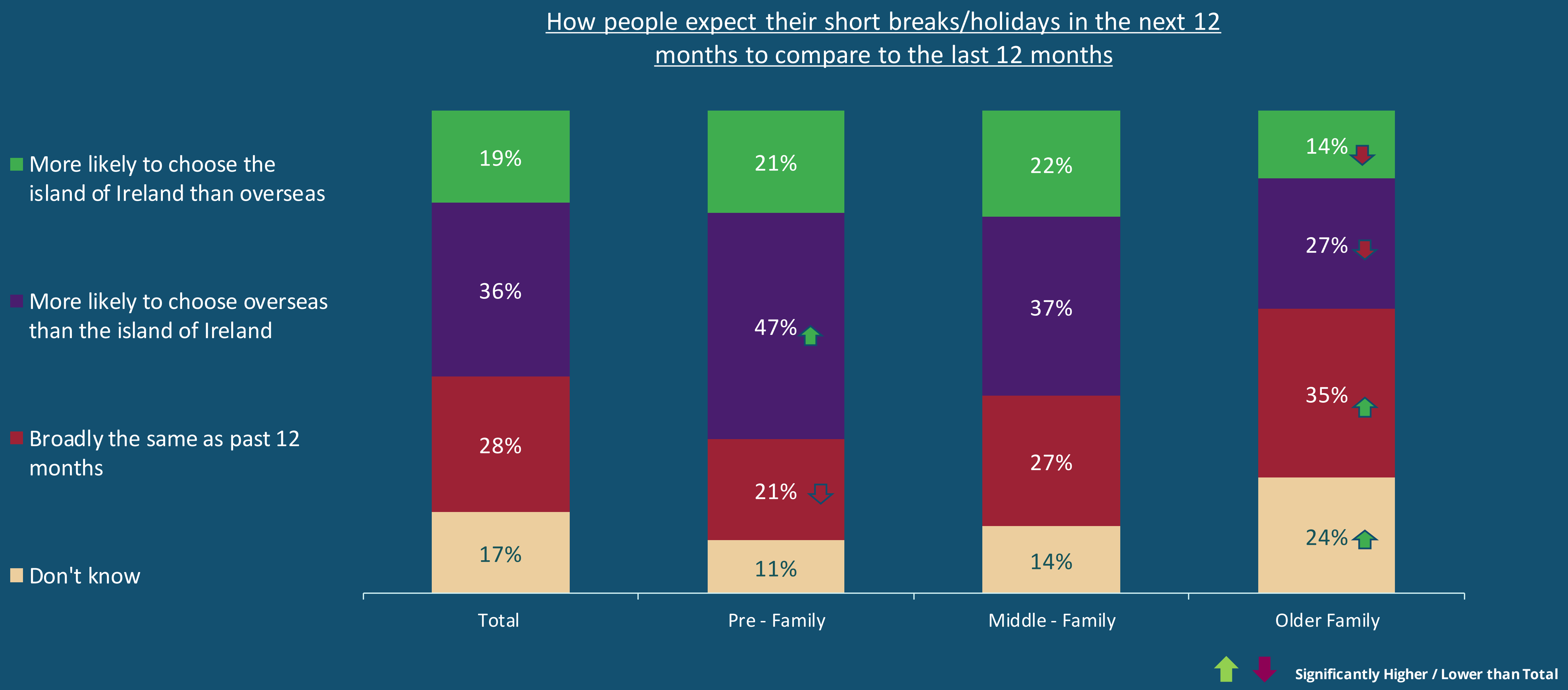


35-54 are more likely to be significantly affected (44%) by the cost of living increases whereas 55+ are less likely to be significantly affected (32%)

N = 748

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

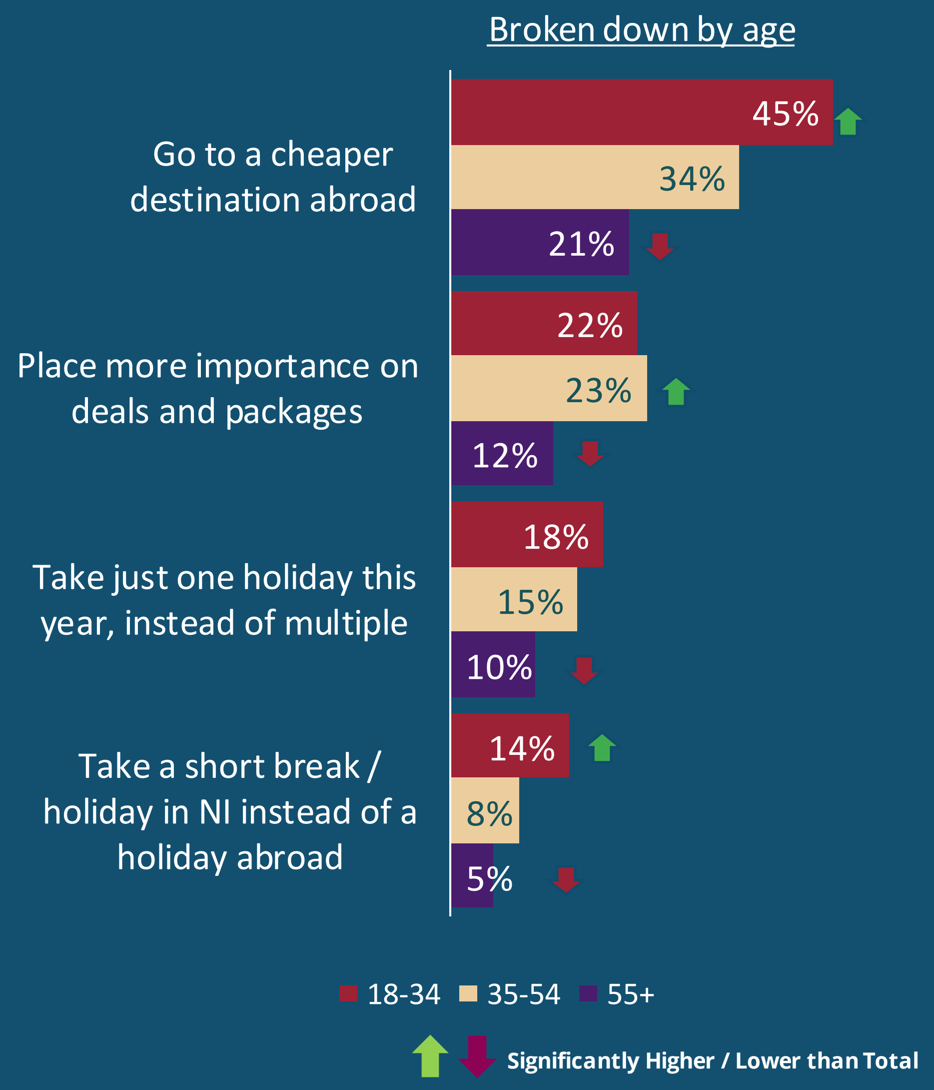
Over a third of people are more likely to choose overseas than the island of Ireland. Almost 3 in 10 will holiday similarly as in the past 12 months.



N = 748

F3 Thinking of the next 12 months, how different do you think your short break/holiday choices will be compared to the last 12 months?

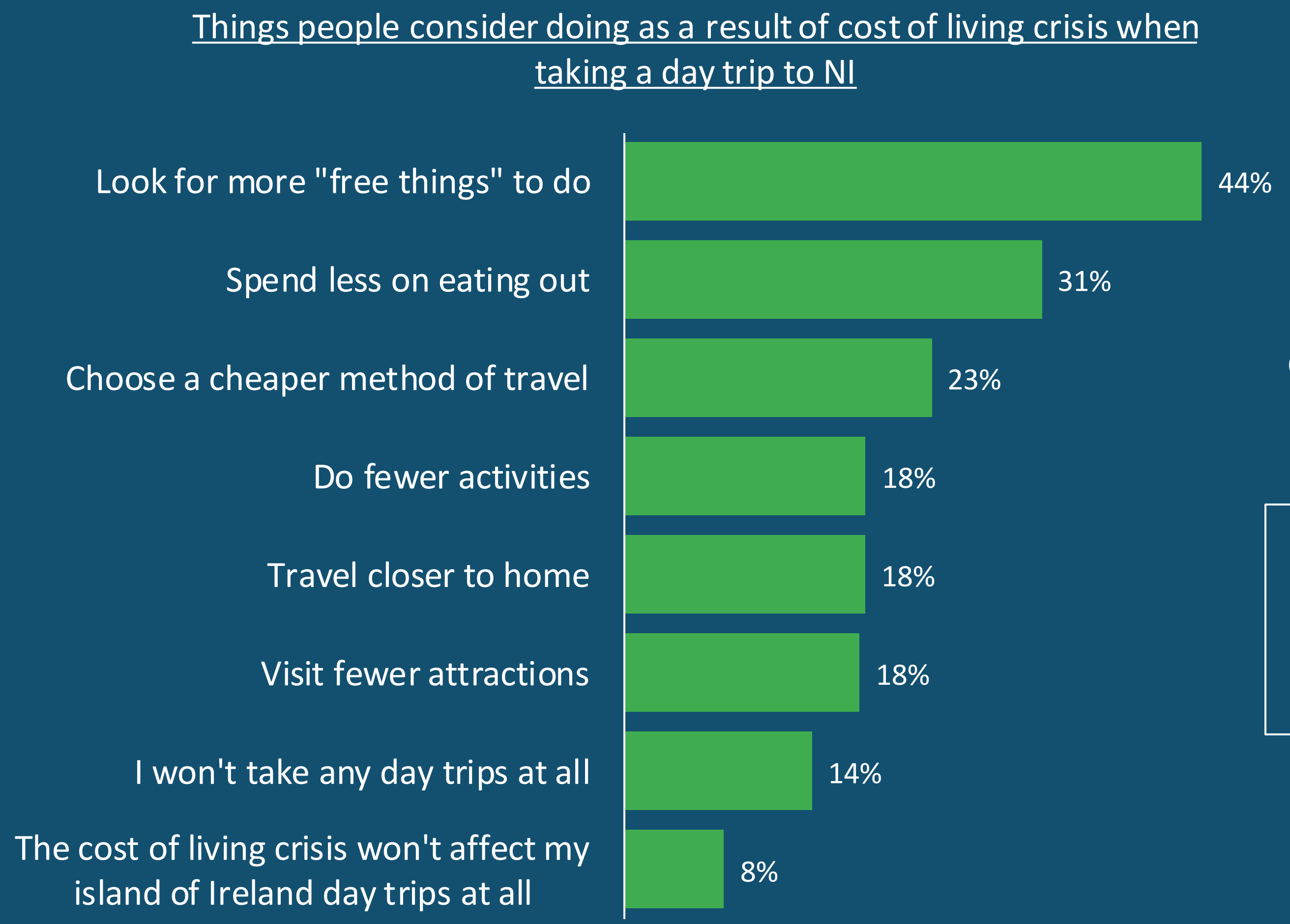
People are most likely to spend less by booking cheaper destinations as well as spending less while on holiday

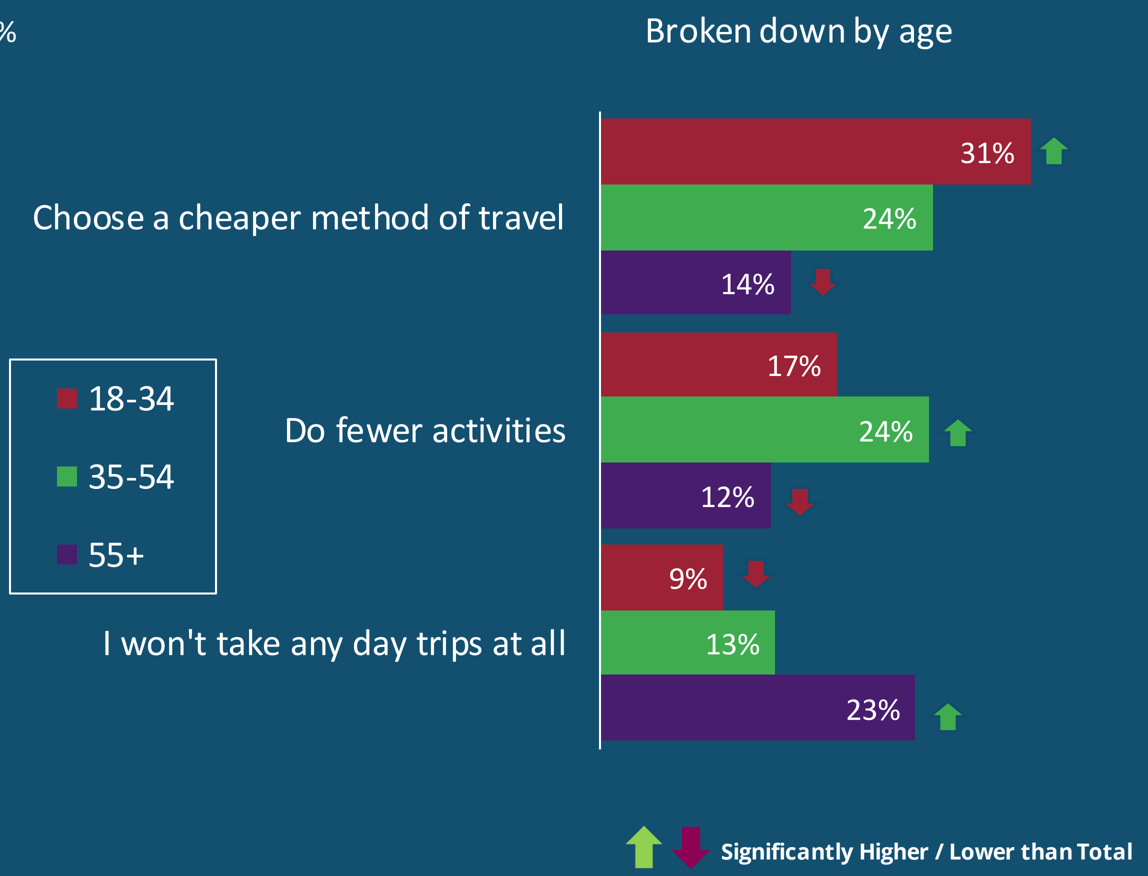


N = 748

F6 Compared to this time last year, which, if any, of the following are you more likely to do in relation to holidays and short breaks?

Free activities and spending less on food are the most considered options when planning a day trip to NI as a result of cost of living



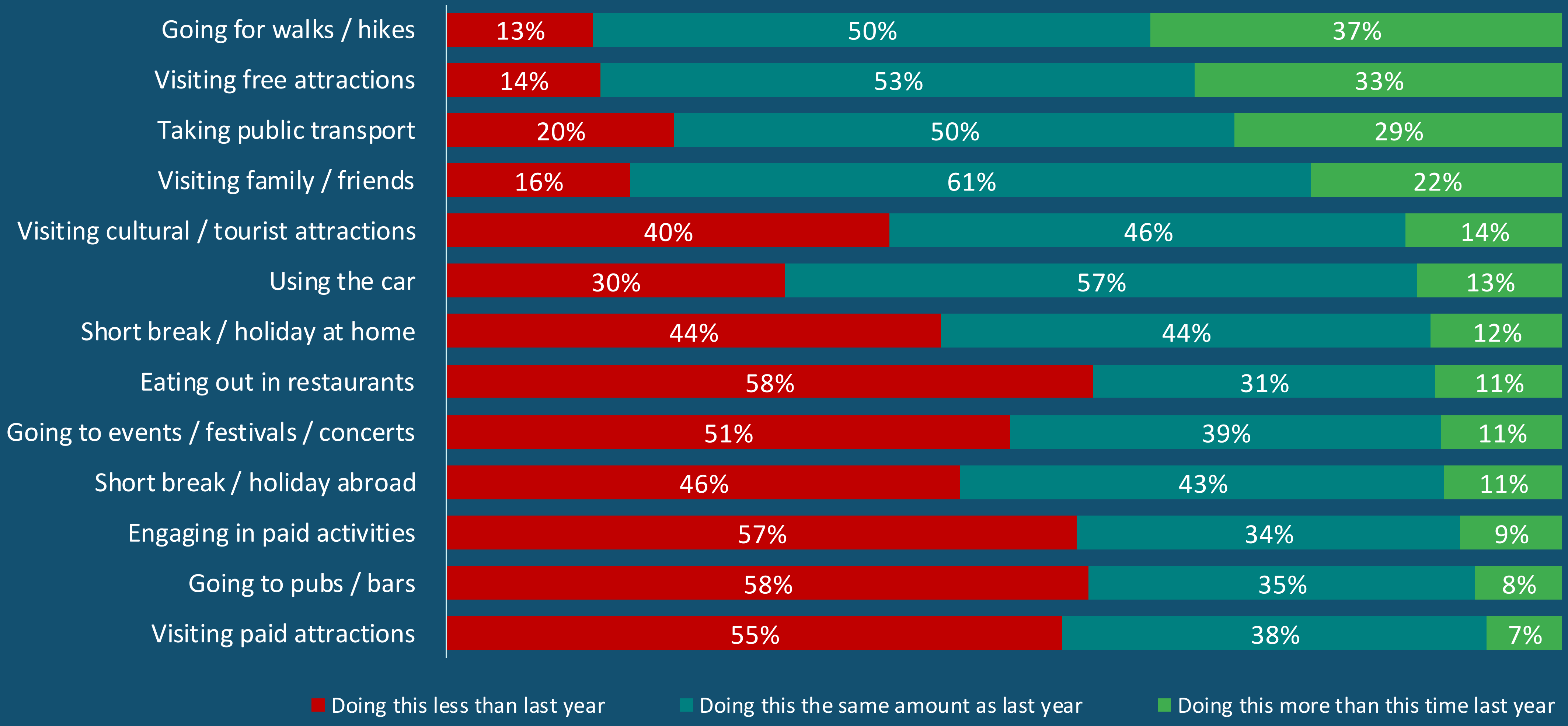


N = 748

F7 Which of the following would you consider doing as a result of increases in cost of living if planning a day trip in Northern Ireland in the next few months?

People are looking to spend less by doing more free activities such as walks, free attractions as well as visiting family

Things people are more/less likely to be doing this Autumn/Winter period



N = 748 (does not include N/A answers)

F8 Compared to this time last year, which of the following are you likely to be doing more or less of over this Autumn / Winter period (October to December 2023)?

Market comparison – Cost of living

Both markets are equally as impacted by the cost of living crisis. However, ROI are more likely to travel oversees compared to NI

- Around 9 in 10 consumers in NI and ROI say they expect to be impacted by the cost of living crisis.
- We do see that those in NI are more likely to travel within the Island or Ireland compared to ROI consumers who say they are more likely to travel overseas.

In terms of cutting costs both markets share key similarities but also some key differences

- Both markets are looking to spend less on holiday as well as go to cheaper destinations. However, those in NI are much more likely to say they will consider NI over overseas compared to ROI.
- When considering day trips in NI, around half are looking for free activities. Similar to longer trips NI are more likely to travel closer to home than those in ROI.