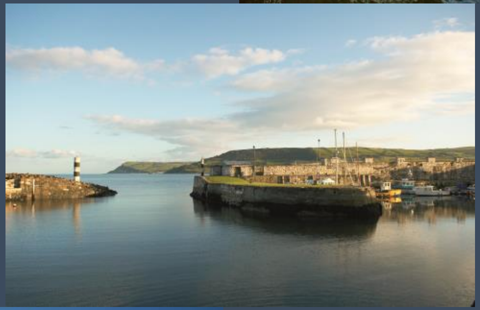
Consumer Sentiment
ROI Market
April 2022 Report



tourism northernireland

SPARK
The Strategic Insight Agency

Research background

Research Background & Objectives

This is the 8th 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, keeping an eye on how things are changing.

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?

Fieldwork carried out end of March

25th March

19,866 Covid cases as expert says surge 'inevitable'

30th March

Covid Ireland: 12,508 new cases as Leo Varadkar says current wave expected to peak in next two weeks

26th March

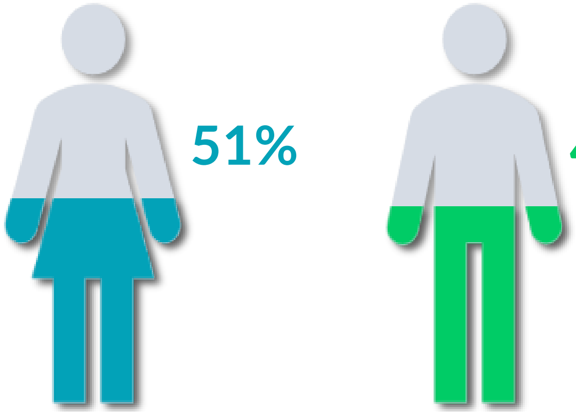
Ireland was caught off guard by the latest full-blown Covid wave

One in every 25 people is infected, though the true proportion is probably higher

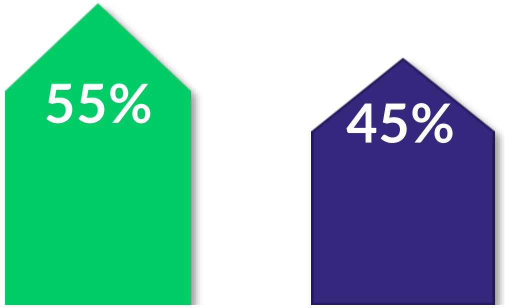
We interviewed a robust, nationally representative sample in the Republic of Ireland

Total sample = 766

Gender



Social Grade



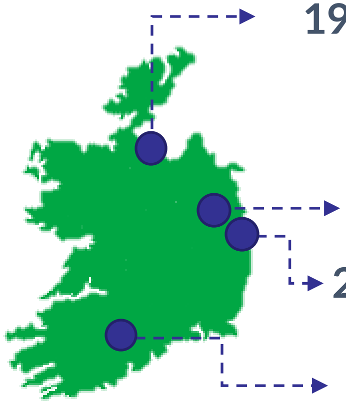
Age

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

Lifestage

Pre-family	25%
Young family	12%
Mid family	11%
Older family	20%
Empty nesters / Older, no kids	33%

Region



Base n = 766

Key Takeaways

Growing cases means a rise in uncertainty

- Number saying the 'worst is still to come' for the following month jumps from 12% to 21%
- We also see some dips in terms of safety perceptions (ROI safety down 6pps to 83%) and levels of ease around activities (e.g. pubs, indoor events).

…but nothing like previous spikes – levels of stress/anxiety remain low

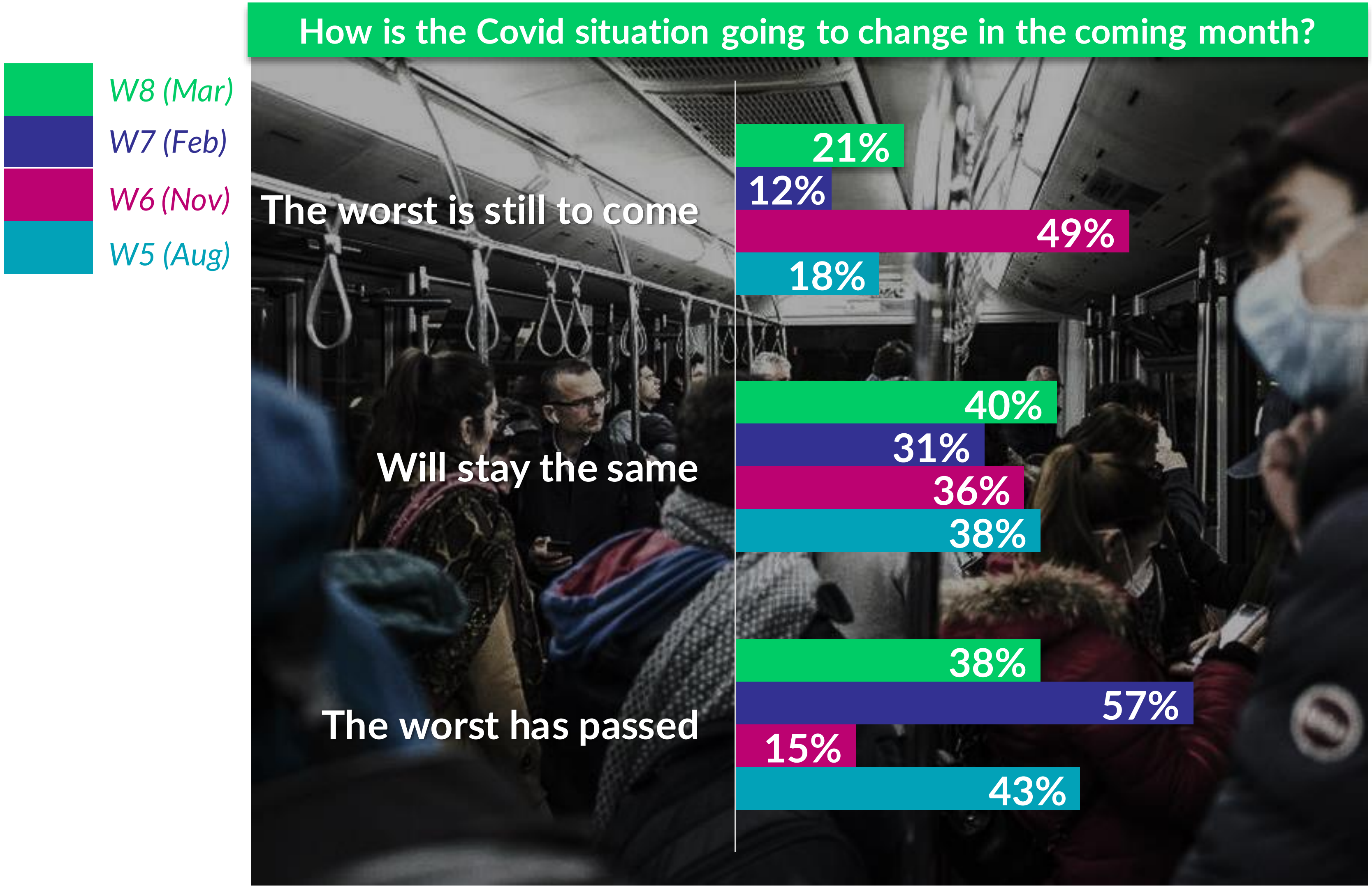
- However, number reporting high levels of stress/ anxiety has dropped to 25%
- And crucially, travel intentions to NI are not hit – stable compared to last wave for spring and summer. High levels of travel intentions for trips abroad are evident, therefore competition will remain high throughout spring & summer 2022.

Cost of living increases present an opportunity to TNI

- 88% expect to be impacted at least somewhat by cost of living increases, with the main impact on tourism likely to be people looking to cheaper destinations abroad – people in ROI see holidays on Island of Ireland as costly
- However NI does not carry same associations – for those feeling the pinch, NI could be a viable solution.

Covid-19 and tourism

Growing case numbers reflected in sense that things will get worse over coming month



More negative outlook among **older, no kids** (29%) and **over-65s** (27%)

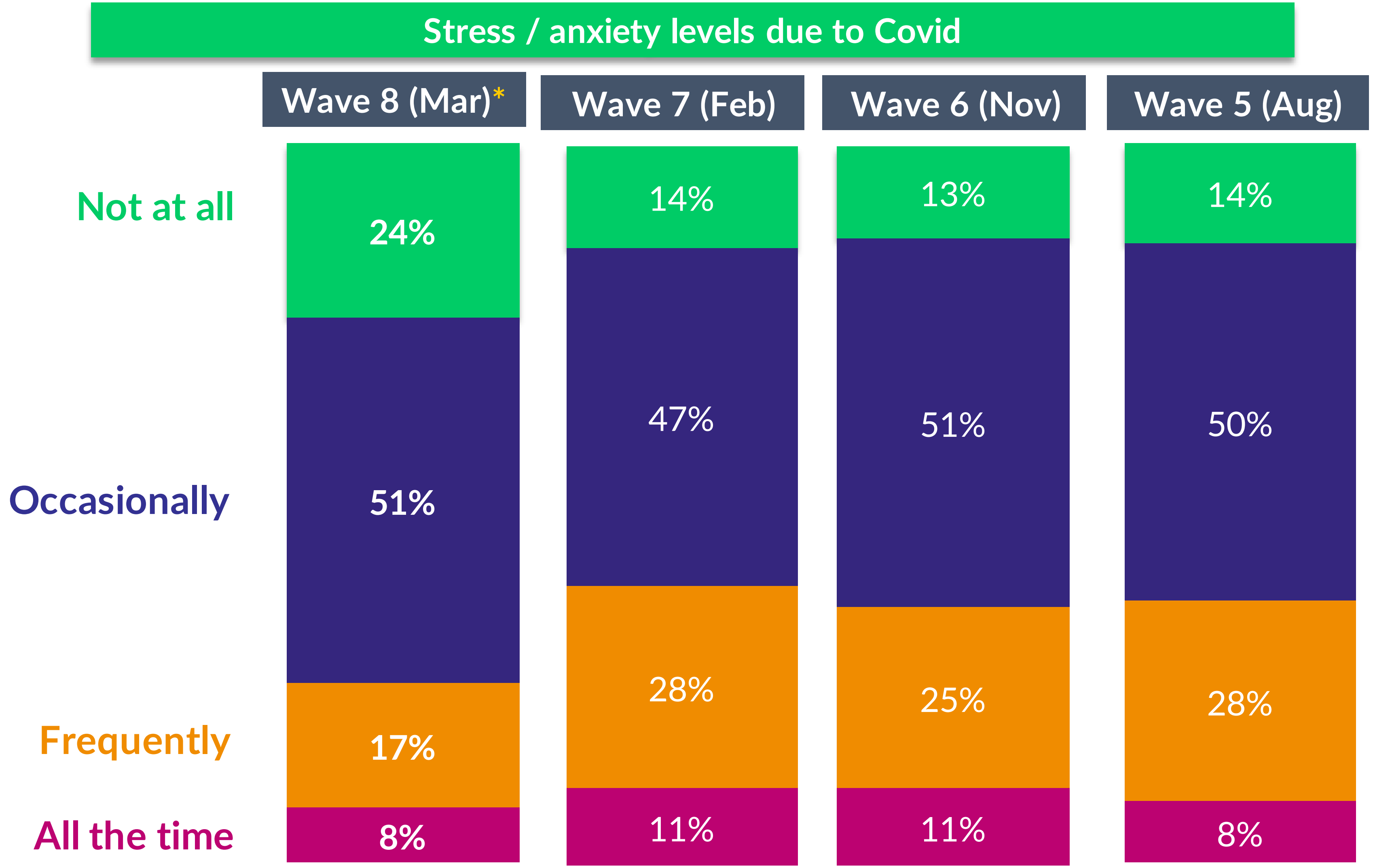
Figures are for 'coming month' – so increased concern likely reflects growing case numbers rather than concerns that we're going back into restrictions etc.

More positive outlook among **18-24s** (43%), **Dubliners** (47%) and **young family** (48%)

Base n = 766

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?

Still 1 in 4 frequently stressed/ anxious – but anxiety is **decreasing**



Female participants most likely to report being anxious frequently / all the time (**32%**)

* *NB question changed slightly for March research. Now reflects stress 'due to Covid' over the past month rather than 'during Covid'*

Base n= 766

A1b. How would you describe your stress and anxiety levels due to Covid-19 in the last month?

Market Comparison

Covid-19 & Tourism

Market anxiety levels have flipped again – now NI more optimistic about outlook

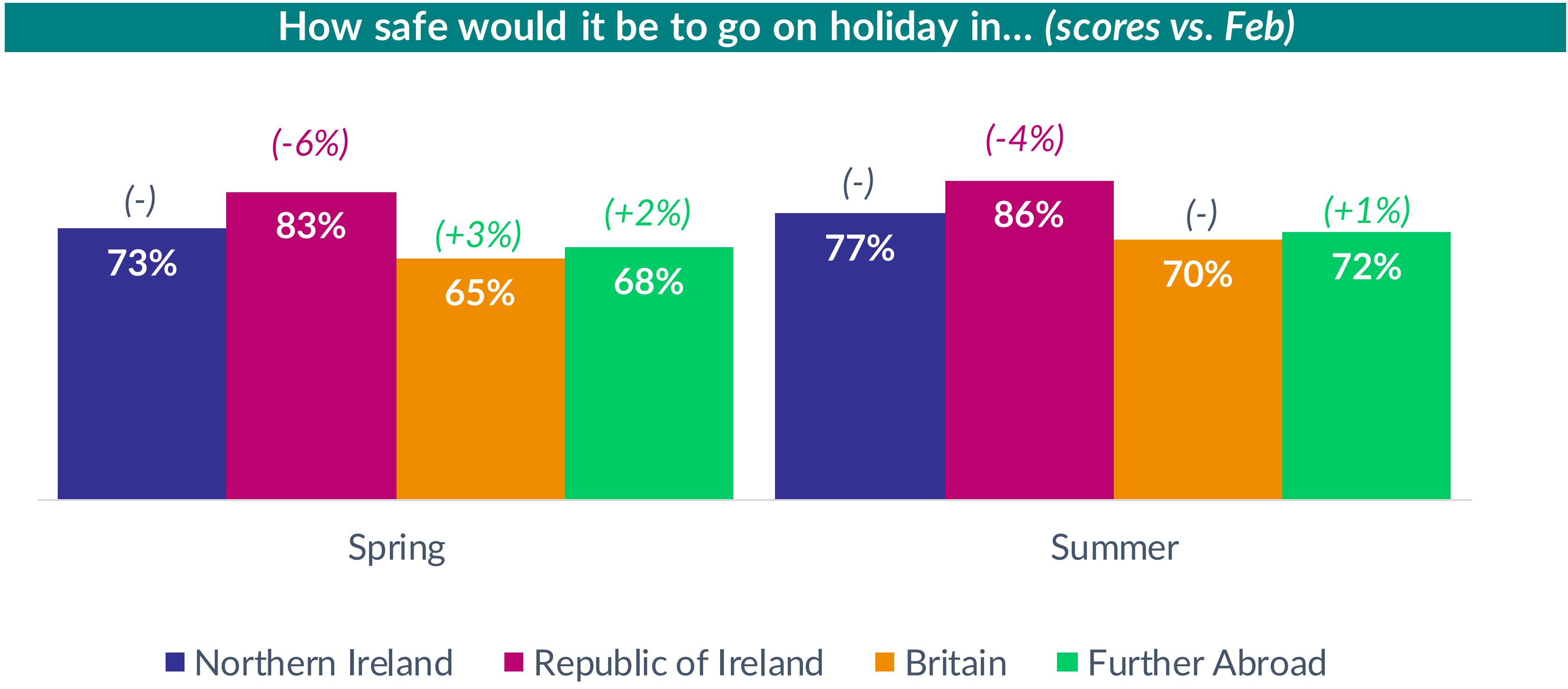
38% in ROI think the 'worst has passed' – in NI, this figure is **46%**

Levels of stress dropping in both markets

28% anxious frequently / all the time in NI; **25%** in ROI. Levels of anxiety do not reflect growing case numbers

Current attitudes towards travel

Concerns about holiday safety **do not extend beyond home market** – ROI safety perceptions hit but NI stable



Base n= 766

B1. How safe do you think it would be to take a holiday or short break in each of the following locations in April – June 2022? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations in July – September 2022?

7 in 10 still confident that a holiday would not be cancelled if booked this month (May 2022)

71%
would be confident in a
n Island of Ireland this mo ay)

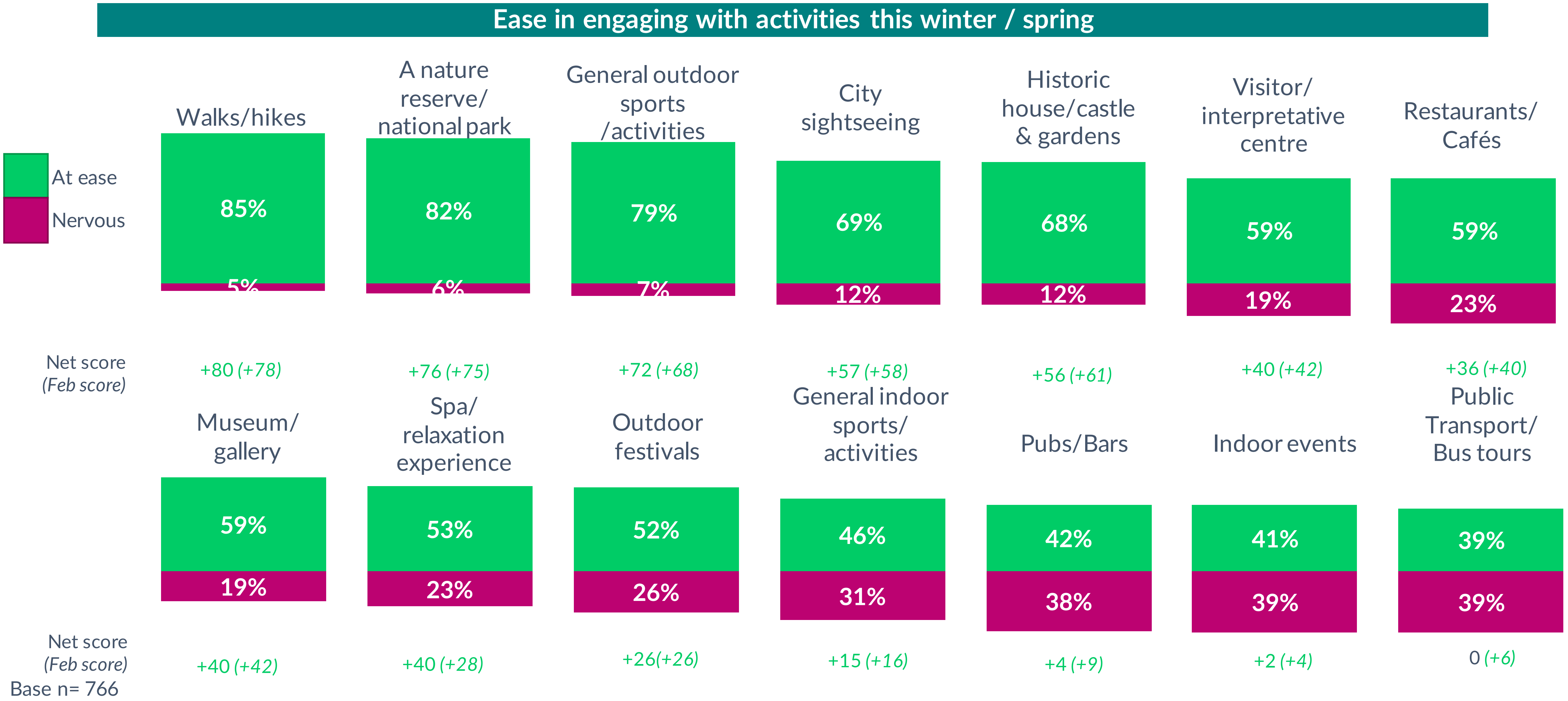
W6 (Nov): **29%**
W7 (Mar): **64%**

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

Base n= 766

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)?

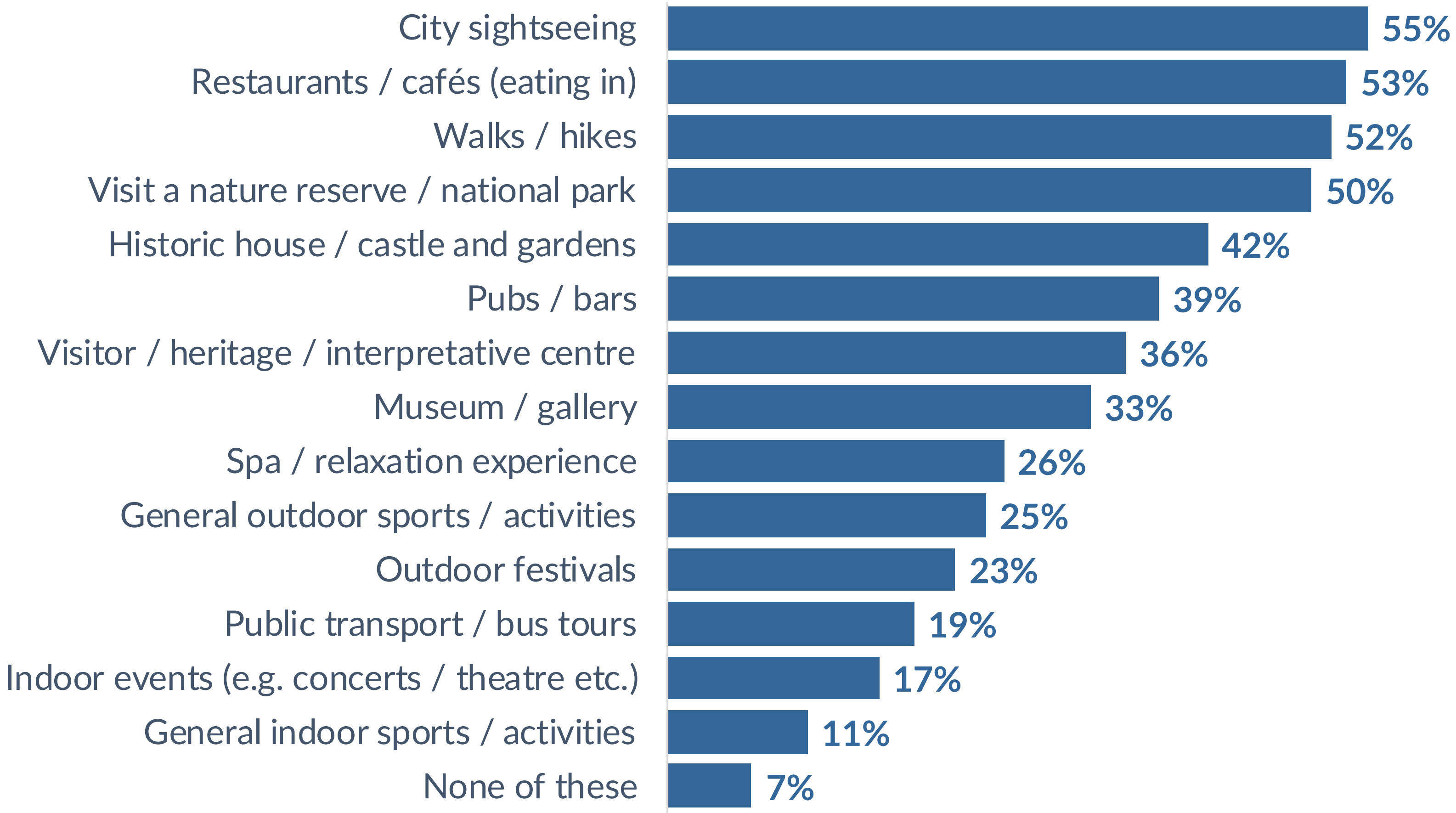
Ease with indoor activities not hit, many **still comfortable attending pubs and indoor events**



B4. How do you currently feel about engaging in these activities over the next few months (April – June 2022)?

Restaurants and pubs still high priority for those travelling, but city sightseeing remains **number one interest**

What they'd be interested in if visiting NI



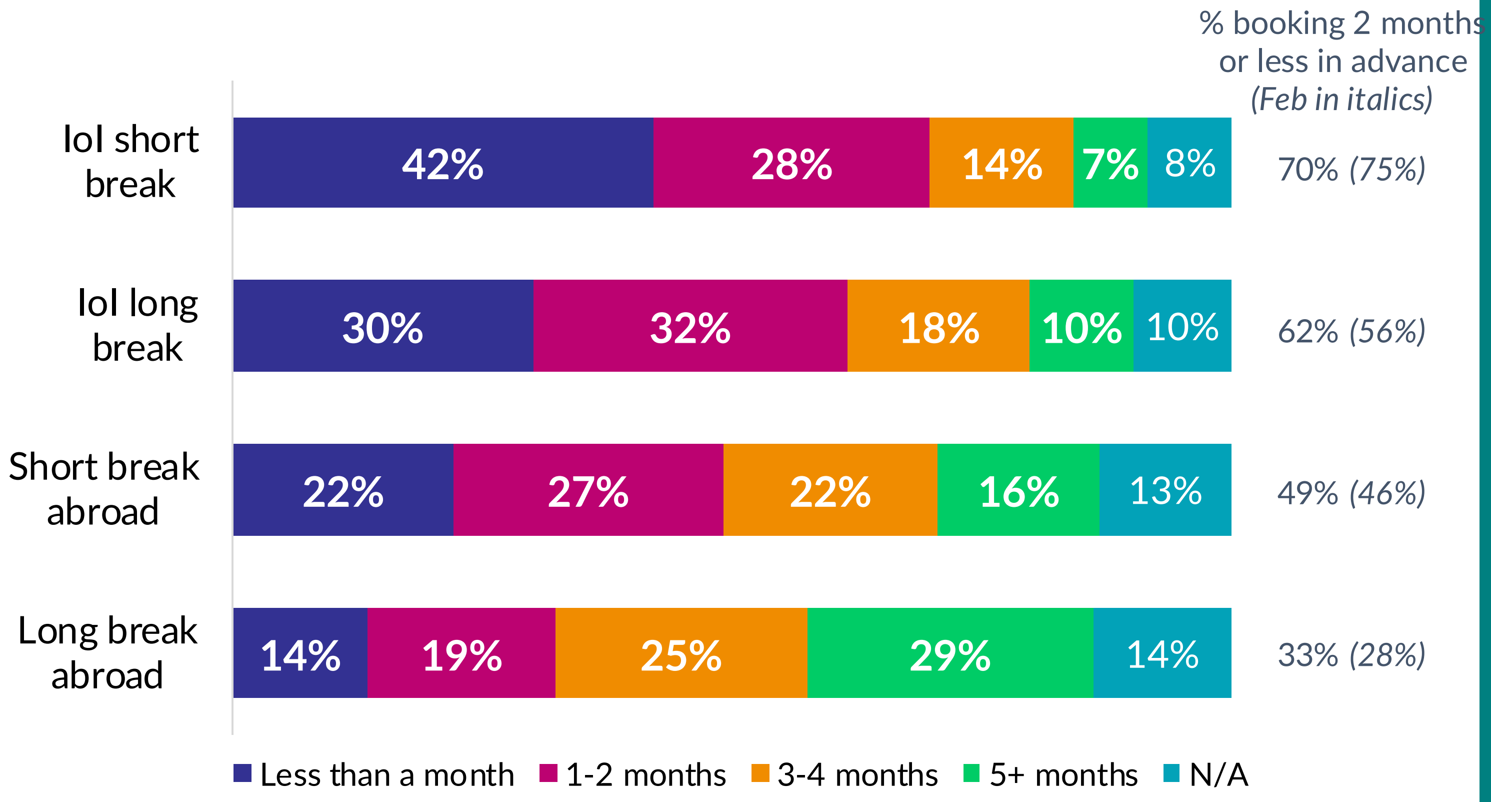
Very little change from last wave – top 5 is the same

Those considering trips to NI favour **restaurants / cafés** (63%) as number one option

Base n = 766

B5. If you were to go on a trip to Northern Ireland today, which of the following activities would you consider doing?

When they'd book (if they were booking a holiday now)



With rising cases, more people considering booking Island of Ireland long breaks closer to date of travel.

Base n = 766

B6e. Thinking about booking holidays or short breaks, how far in advance would you book each of the following if you were booking a holiday for spring 2022 (i.e. April – June)?

Around 2 in 5 of those with dogs would be likely to bring the dog along if considering a holiday on the Island of Ireland, with younger, pre-family cohorts more likely to consider this

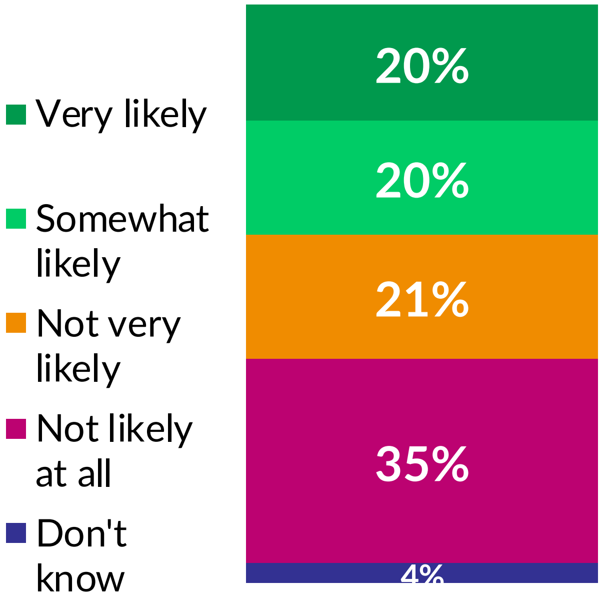
Base n = 766 / 366

Dog ownership and likelihood to bring on an IoI holiday

47% have a dog

40% of dog owners would be likely to bring their dog if holidaying on the Island of Ireland

How likely would you be to bring your dog on an IoI holiday?



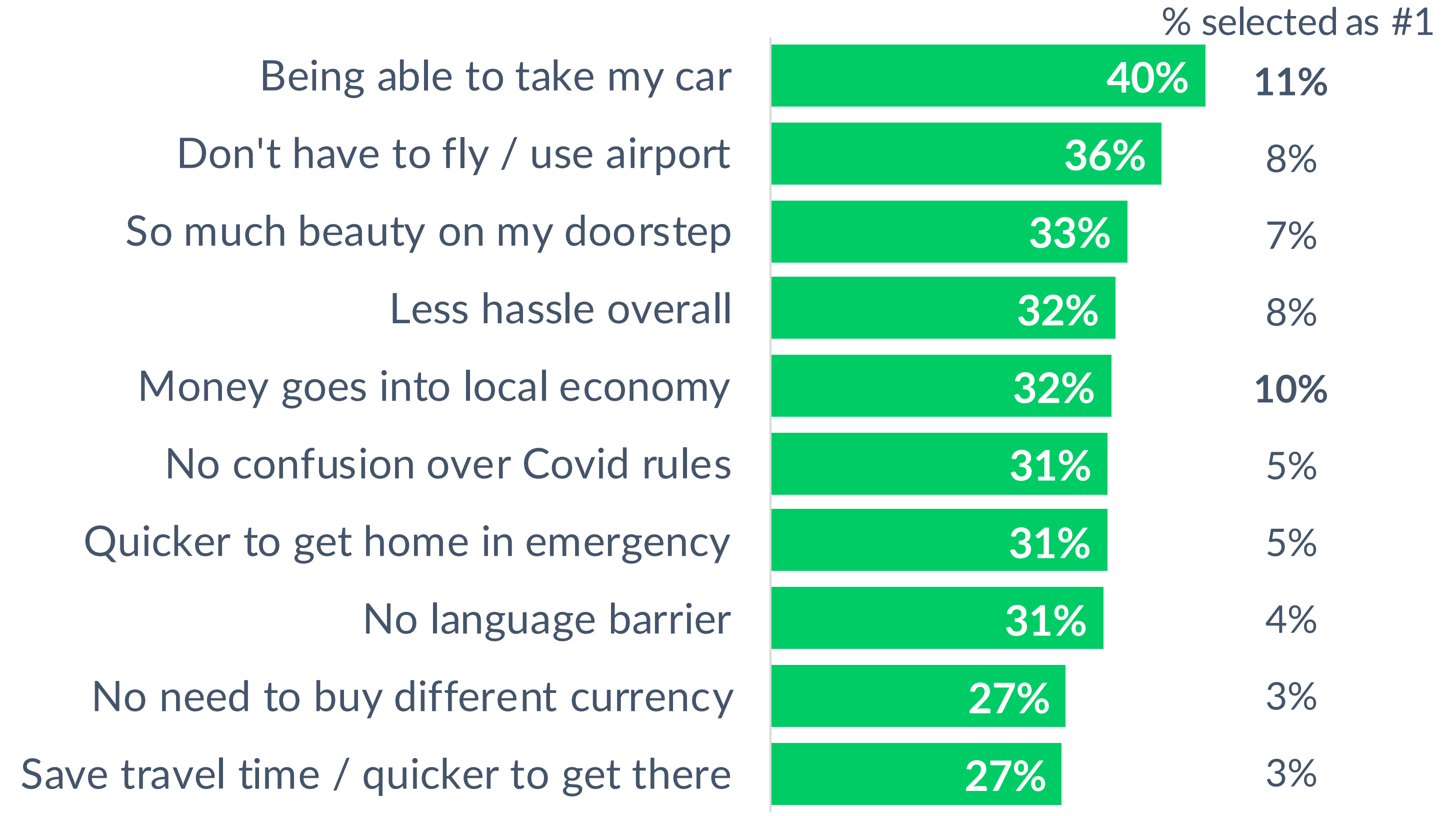
More likely to bring their dog:

- 18-24s **53%**
- Considering trips to NI **44%**
- Those without kids at home **43%**

31% said the possibility to bring their dog would **significantly influence their decision** to holiday in Island of Ireland rather than abroad

E8. Do you have a dog? / E8b. How likely or unlikely would you be to bring your dog if you were considering a holiday or short break on the Island of Ireland? / E8c. And to what extent, if at all, would the possibility of a dog-friendly holiday influence you to holiday on the Island of Ireland rather than going abroad?

Key benefits of a staycation vs. a holiday abroad – top 10



Hierarchy broadly similar across age groups, although over-55s more likely to select not having to use airport (**47%**) and can take car (**49%**)

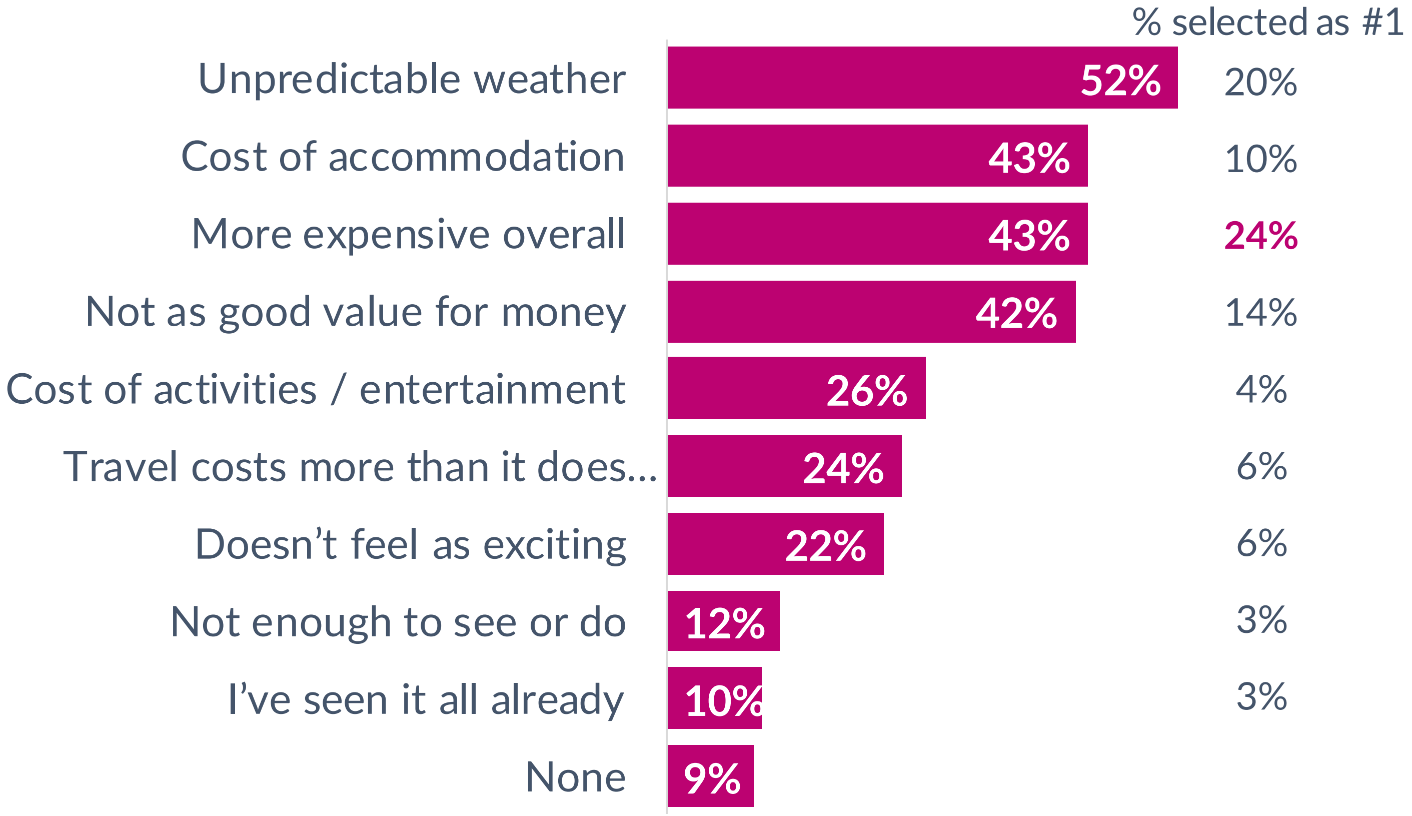
Females more likely to select beauty on doorstep (**38%**) as are Open-Minded Explorers (**50%**)

Top reasons for staycations are practical: can use the car instead of flying

Base n = 766

F4a. What do you believe to be the KEY BENEFITS or POSITIVES of a "Staycation" on the island of Ireland – over travelling abroad? / F4a. Which would you say is the TOP BENEFIT (one only!) of a "Staycation" on the island of Ireland – over travelling abroad?

Key drawbacks of a staycation vs. a holiday abroad – top 10



18-34s more likely to say it **doesn't feel as exciting (31%)**
Over-55s more likely to mention **VFM (49%)**

Females more likely to select **weather (58%)** and **overall cost** (50%)

Cost and **weather** are the two key drawbacks to a holiday at home – **quality of activities** not seen as a key downside by most

Base n = 766

F4a. What do you believe to be the KEY BENEFITS or POSITIVES of a "Staycation" on the island of Ireland – over travelling abroad? / F4a. Which would you say is the TOP BENEFIT (one only!) of a "Staycation" on the island of Ireland – over travelling abroad?

Market Comparison

Current Attitudes towards Travel

NI now in line with ROI for safety perceptions and level of comfort with activities

Both ROI and NI residents at **83%** in terms of safety perceptions of home market. Net ease with pubs: ROI +4, NI +8 – now very similar outlook in both markets

Different views of staycation benefits/drawbacks when it comes to cost

33% in NI see cost-saving as a staycation benefit vs. just **20%** of ROI residents. And they are much more likely to select **weather** as #1 drawback (38%) rather than overall cost (9%). For ROI overall cost is #1 drawback at 24%

Value for money

NI VFM score stable vs. last wave while GB/ROI dip

Value for money	Poor value for money	Good value for money	Net Score: Mar	Net Score: Feb	Net Score: Nov
Spain	8%	56%	+48	+53	+57
Italy	20%	37%	+17	+18	+15
France	25%	30%	+5	+6	+3
Northern Ireland	29%	23%	-6	-8	+1
Great Britain	36%	17%	-19	-14	-15
Republic of Ireland	53%	16%	-37	-33	-29

Increase among those who have visited in last few months from net score of -1 to **+8** – Christmas may have skewed VFM perceptions negatively

N = 766

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

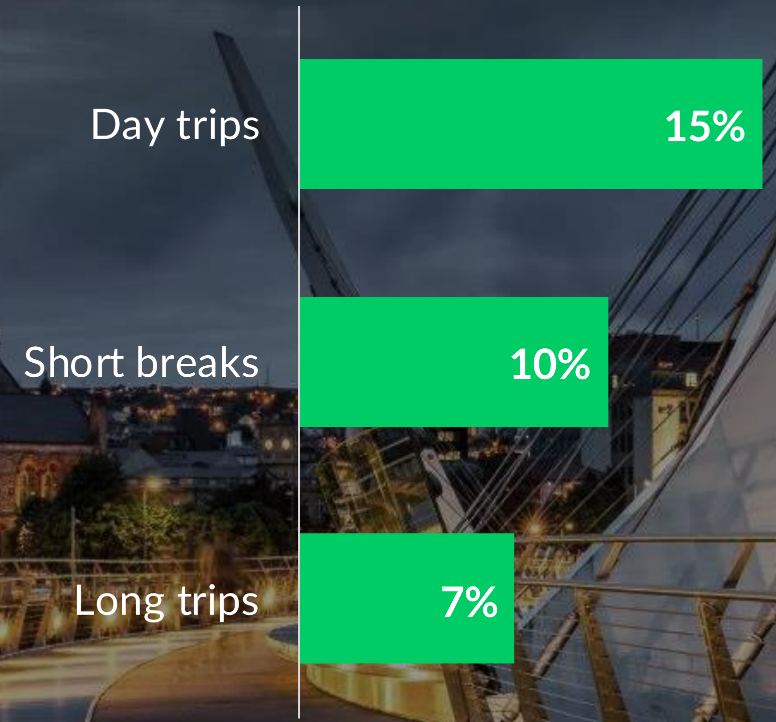
Travel experiences of NI

Roughly **one in five** took a trip to NI so far in 2022 – with continued high levels of **first-time visitors**

14%
have taken a short or long break in NI in 2022 (-2 vs. Feb)

50% were first time visitors to NI

% of total sample who took…



Other than NI…

- **43%** took a break in ROI
- **14%** went abroad
- **46%** didn't travel at all *(stable vs. February wave)*

N = 766

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 2022?

How did the trip perform vs. expectations?

		Nov
45%	said their trip **exceeded expectations**	*43%*
44%	said their trip **met expectations**	*49%*
11%	said their trip **didn't meet expectations**	*7%*

Would they be likely to return?

63% would be **likely to return in the next few years**

16% would be **unlikely to return**

Nearly half saying trip exceeded expectations, slightly higher than when this was last tested in November

Most would also return in the next few years

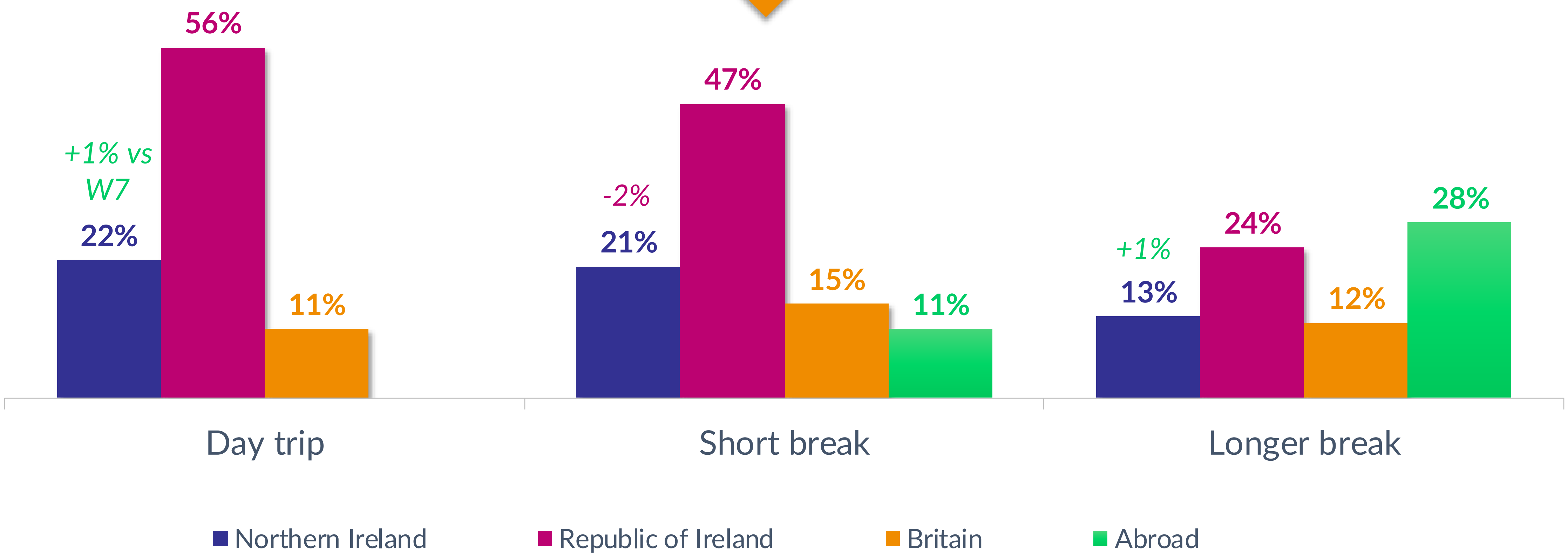
N=158 visited NI in 2022

D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations? / D6. How likely would you be to return to Northern Ireland for another break in the next few years?

Travel intent

Break intentions for NI from the Republic **stable vs. February research** – unaffected by rise in case numbers

Intentions of Taking a Break in next 3-4 months



Base = 766

Short and long break intentions still **well up on last year**

Intention on taking a break to Northern Ireland in next 3-4 months

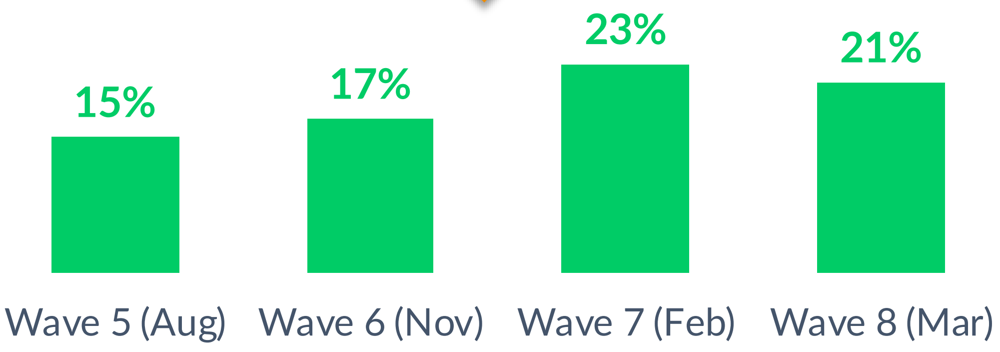
22% Leisure day trip

21% Short break

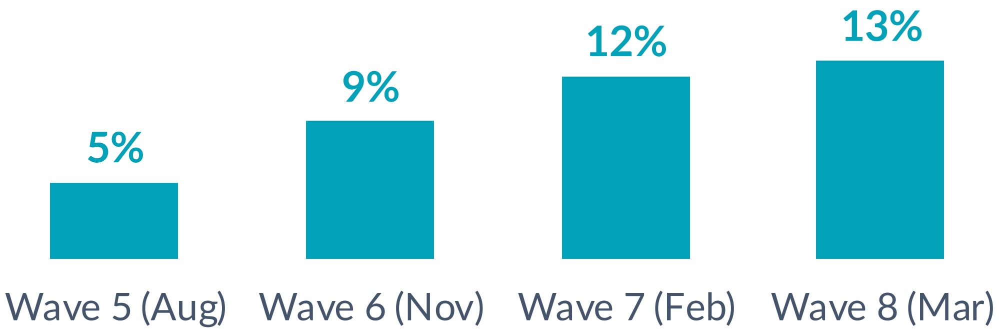
13% Long break

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



Long Break to NI



48% actively planning their short trips (10% of total sample)
Actively planning highest among 18-34s (59%), Indulgent Relaxers (55%), Active Maximisers (61%)

40% actively planning their **long trips (5%** of total sample)

Base (n) = 766

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?

Number **actively planning short trips** grows

N =766

21% considering taking a short break in Northern Ireland
W7: 23% W6: 17% W5: 15% W4: 9% W3: 10% W2: 13% W1: 13%

How much of your short trip have you planned?

N =161

+5%

I have booked	Actively planning	Intend to start planning later	May or may not plan
9%	39%	32%	20%

48% are actively planning a trip to NI – **10%** of the total sample

N =161

*Consideration of short breaks to Northern Ireland in:

14% Apr

33% May

40% Jun

20% 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?

Number considering long trips is **higher than ever**, but most still waiting to book later

N =766

13% considering a long break in Northern Ireland

W7: 12% W6: 9% W5: 5% W4: 5% W3: 5% W2: 9% W1: 6%

How much of your longer trip have you planned?

N = 96

No change

I have booked	Actively planning	Intend to start planning later	May or may not plan
4%	37%	39%	20%

37% are actively planning a trip to NI – 5% of the total sample

N = 96

*Consideration of longer breaks to Northern Ireland in:

Apr	May	Jun
6%	29%	44%

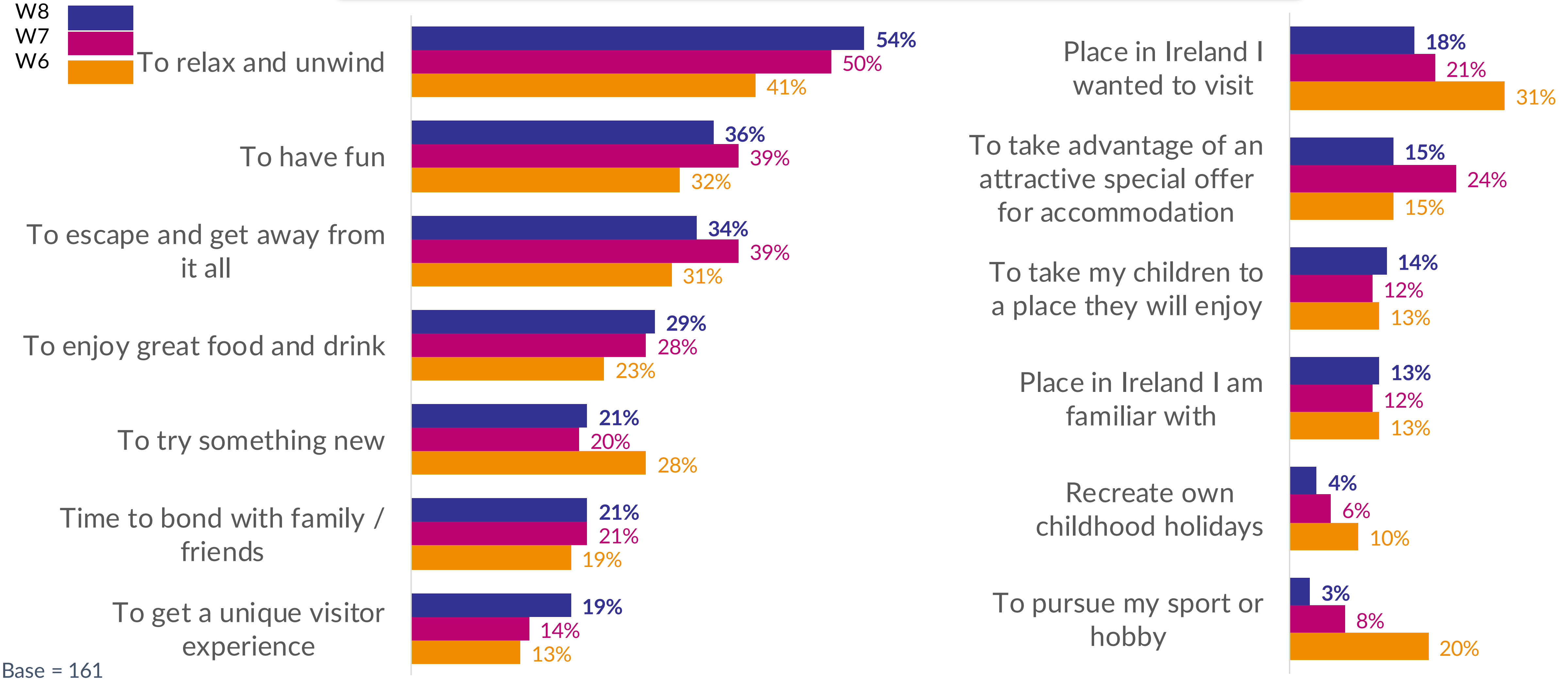
32% don't know

**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?

Continued positive trends for **relaxation / food and drink**

Motivations for longer / short breaks (combined)

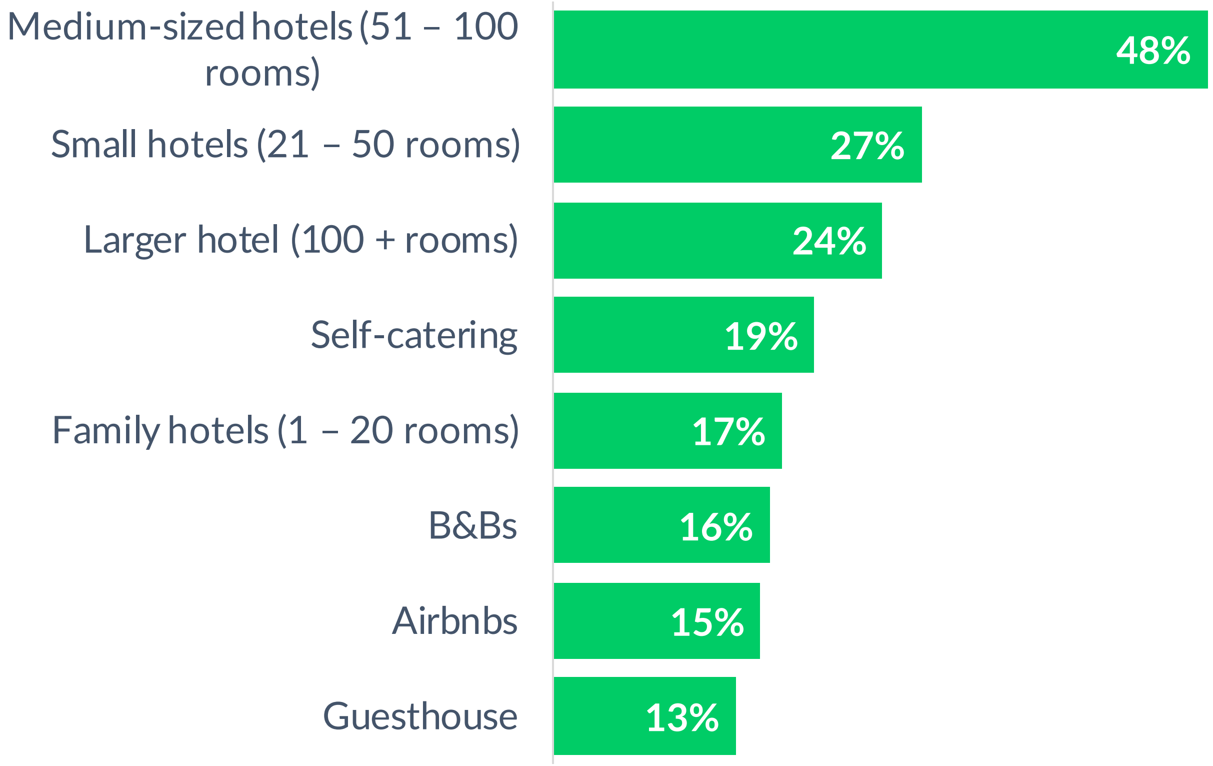


Base = 161

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

Increase in laid back holiday preference, with medium-sized hotels still the key destination

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



Slightly fewer people staying with friends (21% vs 27% W7); and increase in laid back holiday preference (55% vs 52%)

Who travelling with (long & short combined)

- 44% Partner / spouse
- 37% Immediate family
- 21% Friends

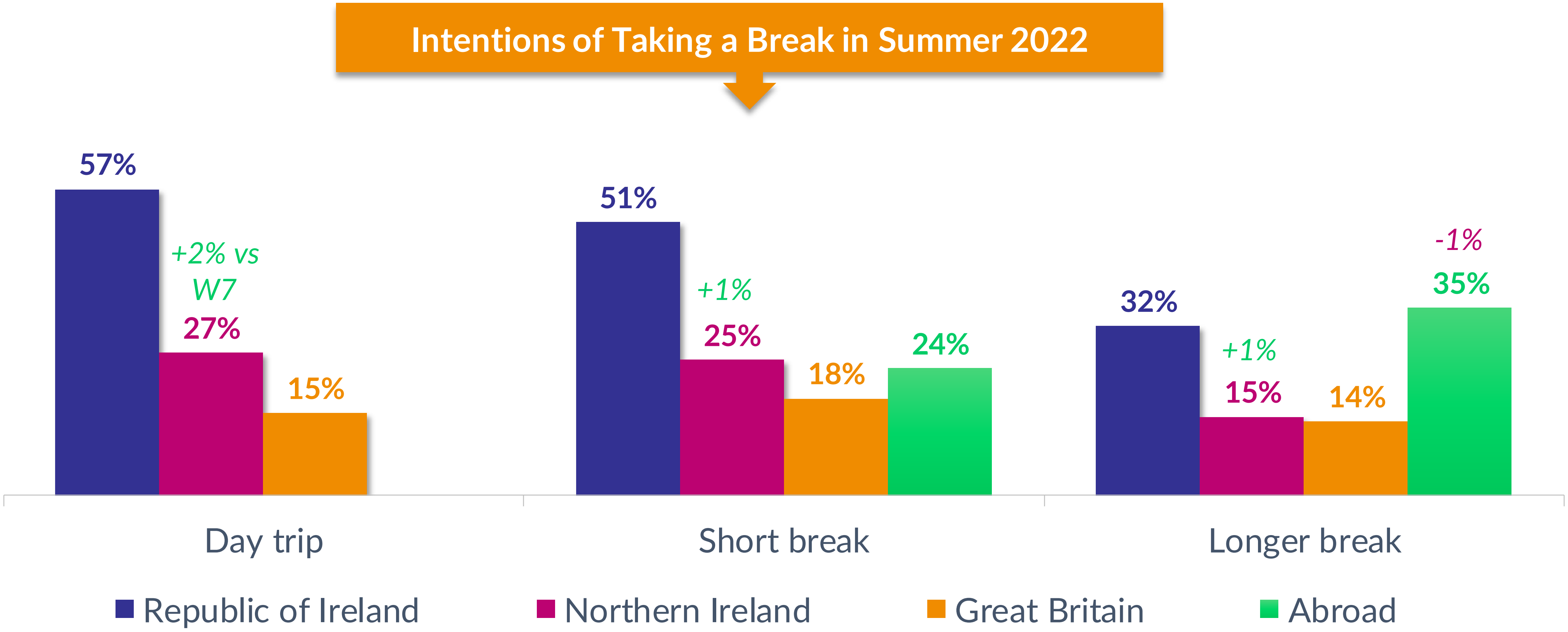
Type of trip preferred

- 55% Laid back holiday
- 9% Exciting holiday
- 36% A bit of both

Base = 257

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

Growth for NI summer trips vs. next 3-4 months, which indicates higher volumes for July to September



Base = 766

Multiple Questions

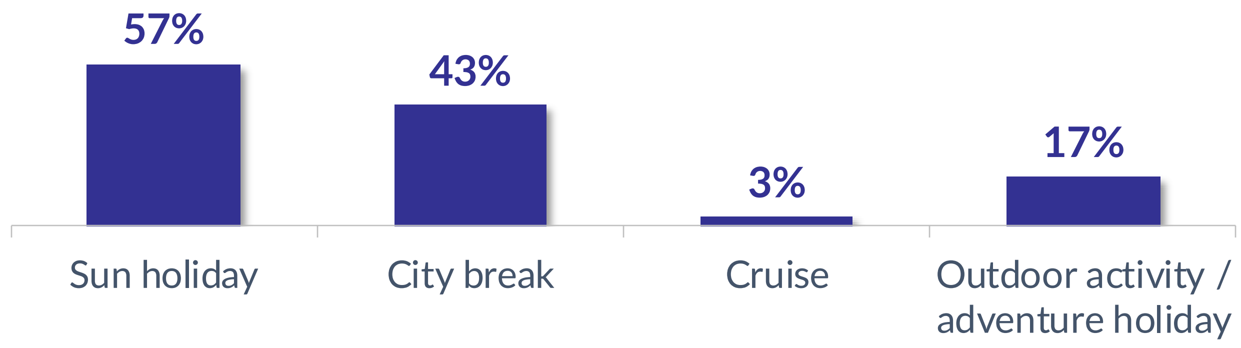
Sun and **value** key reasons for trips abroad – still plenty of pent-up Covid demand too, but warm June weather strongest consideration

31% of total sample are considering a break abroad in the next 3-4 months

66% of this cohort are actively planning or have booked their trips

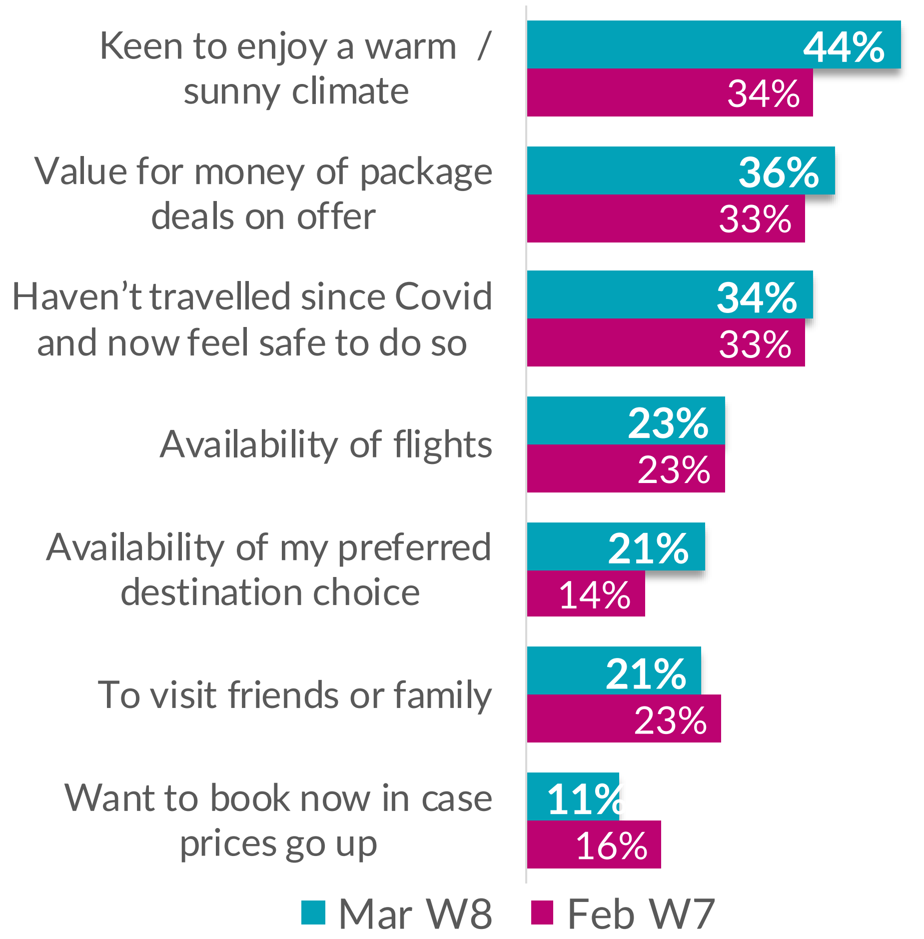
In November, **19%** of total sample were planning a break abroad. In Feb this grew to **33%** so the growth in travel intentions has stagnated somewhat

What type of trip are you considering?



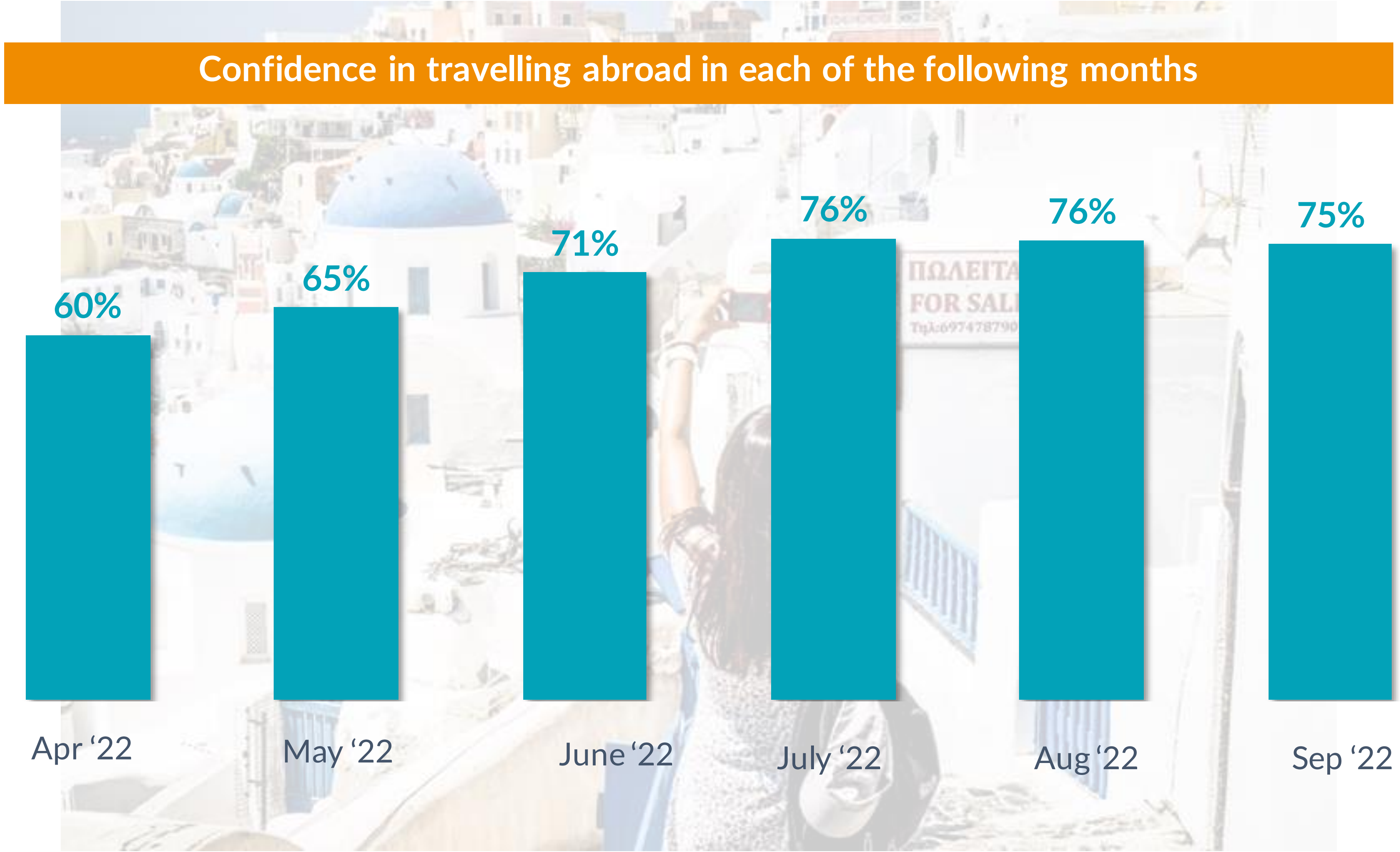
Base = 234 considering trip abroad

Reason to consider a trip abroad April – June



E14. You mentioned that you are considering taking a break abroad in the next 3-4 months (i.e. between April and June). Have you booked or thought about planning this trip abroad? E15b. What has encouraged you to consider a holiday or short break abroad between April and June? E15. What type(s) of holiday or short break abroad are you considering?

Confidence in travel abroad still strong



Younger participants (18-34) are more confident in being able to take a trip abroad in the shorter term - 67% feel confident they could go abroad in April; 73% in May

Base = 766 total sample

E15c. How confident are you that you would be able to go on a holiday or short break abroad in the following months (i.e. you won't have to cancel)?

Market Comparison

Travel Intent

Travel intentions stable in both markets – although short break plans take a slight dip in NI

21% intend to take a short break in NI, down from 23% in Feb.

Significant jump in summer travel abroad interest in NI, while ROI intentions remain high

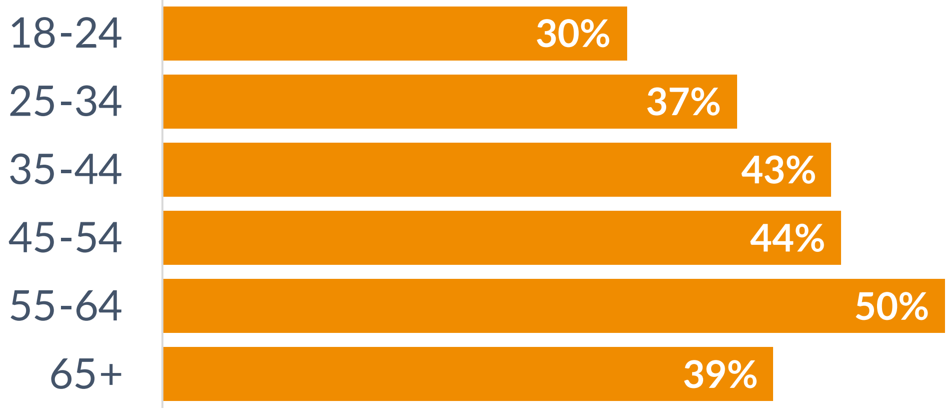
NI now similar levels of interest for summer travel abroad (31%) to ROI (35%). This is a jump from 21% and reflects growth in Covid comfort in NI that we saw in ROI last wave.

Cost of living & Ukraine

Nearly 9 in 10 expect to be hit by cost of living increases – particularly those with older kids. Package deals will likely be appreciated

Extent to which they expect to be affected by cost of living

% expect to be 'significantly' affected, by age



Also more likely to be significantly affected:

- **Older family** 49% / **Empty Nesters** 45%
- **Connacht / Ulster** 46%
- **Female** 45%

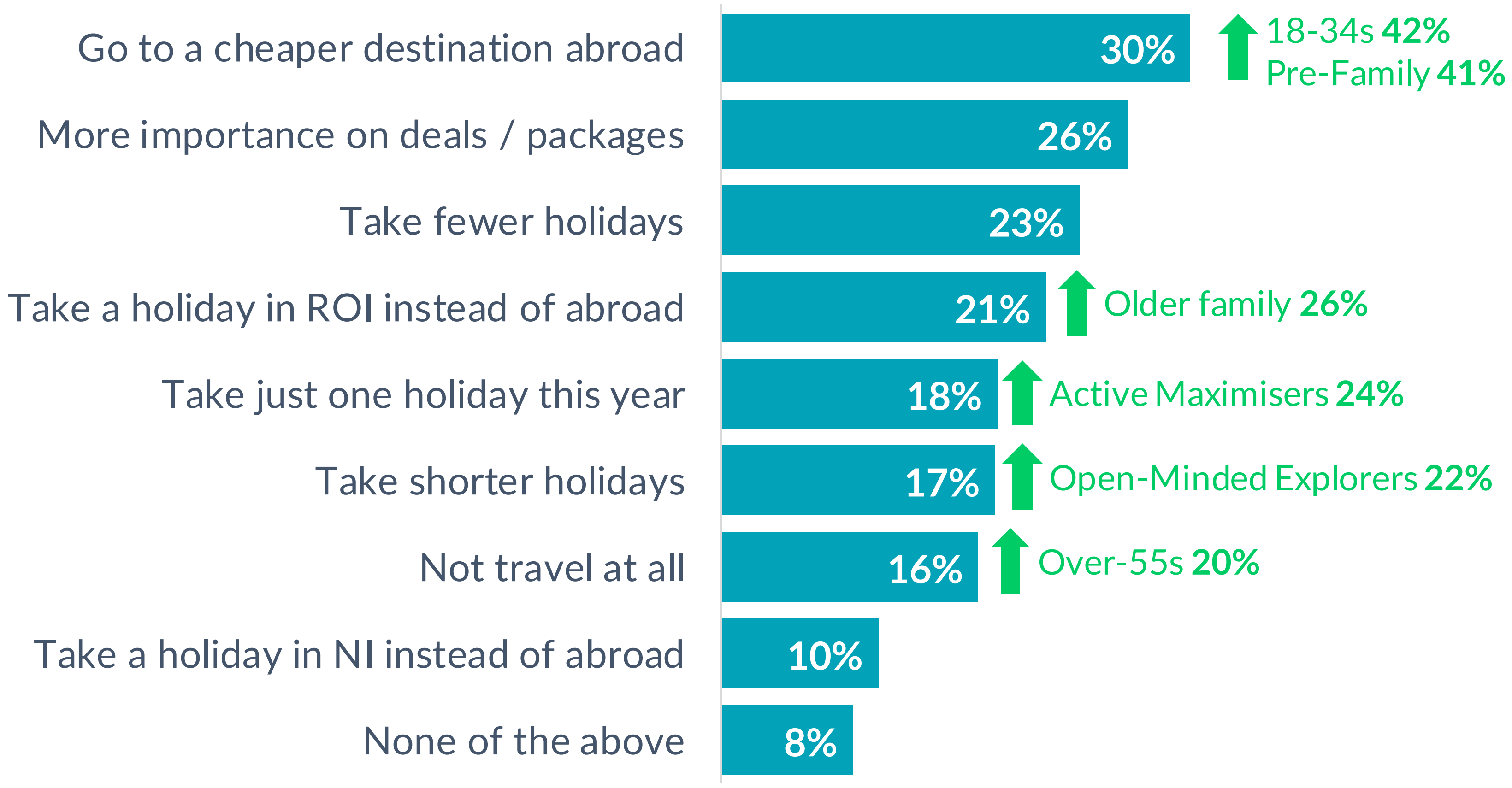
Indulgent Relaxers less likely to be significantly affected (34%)

Base n = 766

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

Cost of living increases **result in people considering cheaper options – younger people particularly likely to consider breaks abroad**

Those impacted by cost of living – what they'll do re holidays



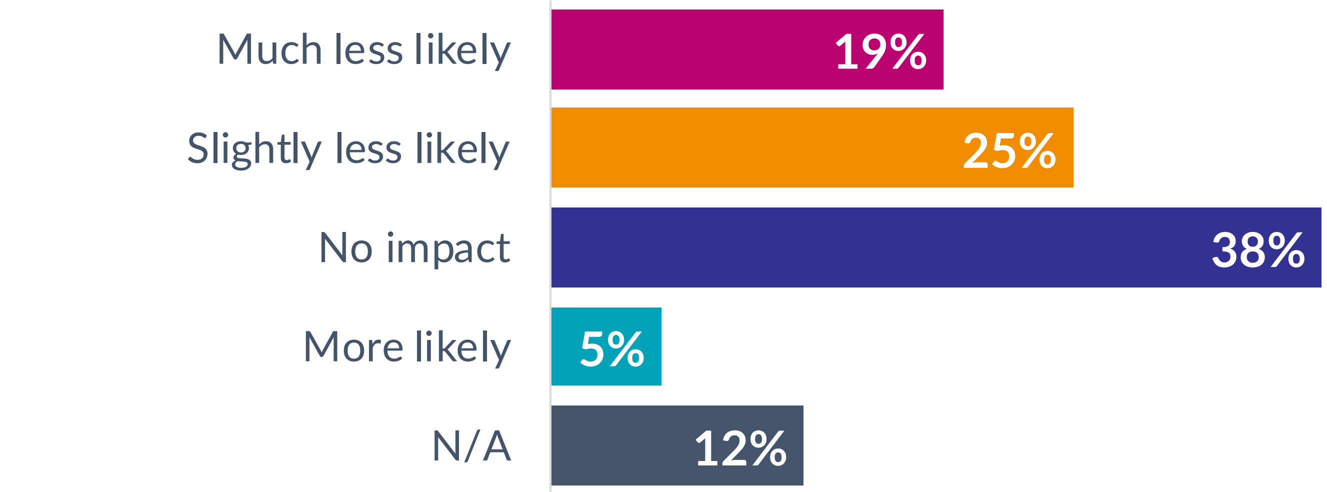
Base n = 670

F2. As a result of cost of living increases, which, if any, of the following are you more likely to do in 2022 when it comes to holidays and short breaks?

45% overall are **less likely** to consider mainland Europe as a result of the Ukraine situation

Base n = 766

Impact of Russia-Ukraine conflict on likelihood to consider a holiday in mainland Europe



Those with young families in particularly likely to be **discouraged from visiting mainland Europe** due to Ukraine conflict

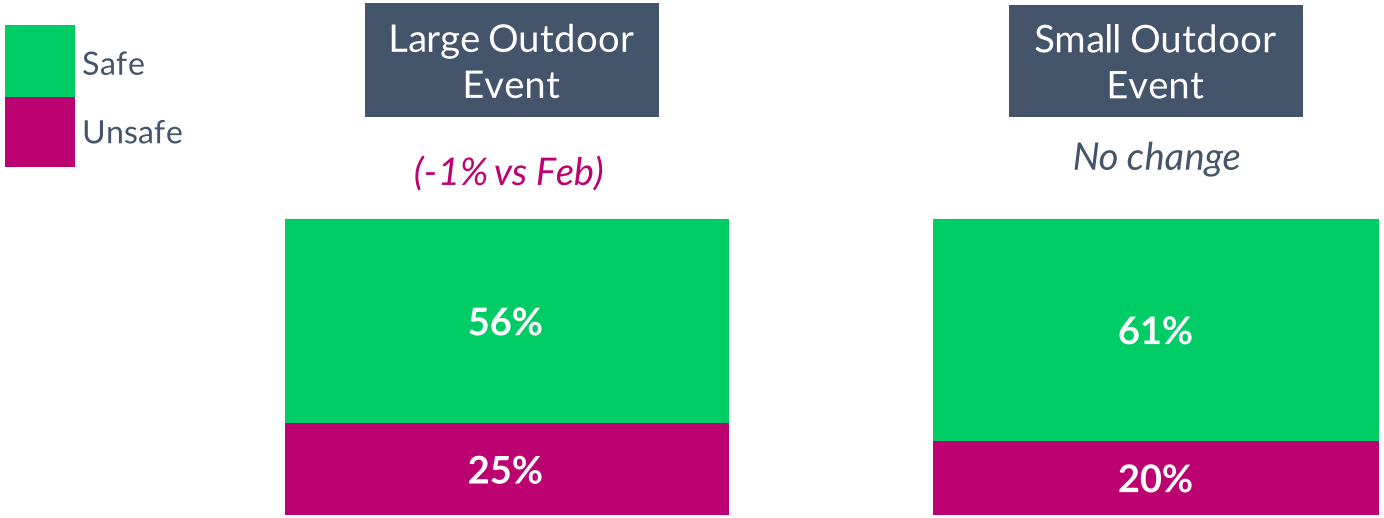
Less likely than average to consider:

- **Young family lifestage** 54%
- **18-34s** 53%
- **Females** 49%

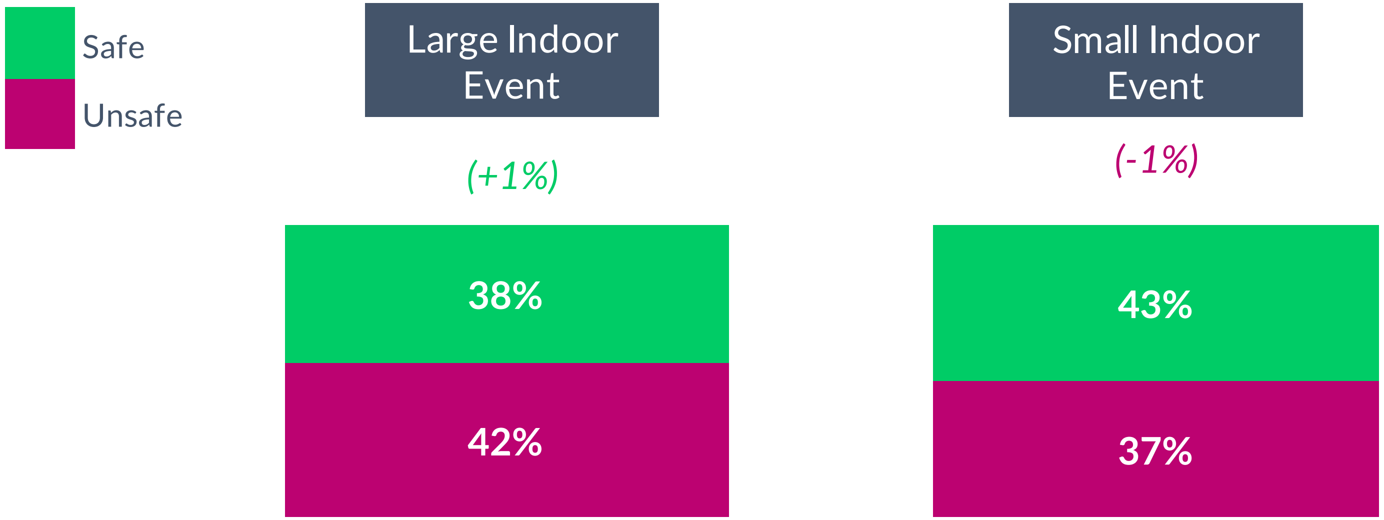
F3. Thinking now about the situation in Ukraine, to what extent, if at all, would this impact on your likelihood to take a holiday or short break in mainland Europe in 2022?

Events

Perception of Safety this Winter - Outdoor Event



Perception of Safety this Winter - Indoor Event



Base n = 766

Confidence in events grew between November and February, but is now stable

Most feeling comfortable with outdoor events, indoor events may still take a while to reach this level

G1. How safe would you feel attending the following live event types in April – June 2022?

For more information, please contact: insights@tourismni.com

tourism northernireland

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The Strategic Insight Agency