Tourism Northern Ireland Consumer Sentiment Research

NI Market – Wave 12 (April 2023)

SPARK
The Strategic Insight Agency

TOURISM NORTHERN IRELAND

Research background

Research background & objectives

This is the **12th wave** of our consumer sentiment research for Northern Ireland (NI). We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how pertinent issues will impact on consumer spend and holiday/short break intentions. This wave had a special focus on the NI food & drink experience.

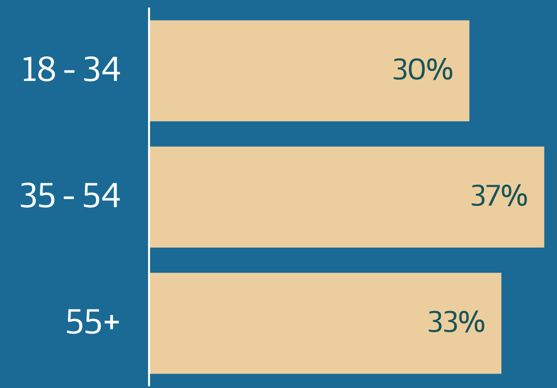
The research objectives:

- Understand recent travel experiences in NI
- Explore current attitudes towards travel
- Assess current attitudes towards travel in NI, Republic of Ireland (ROI) and further afield
- Analyse experiences and attitudes of food and drink in NI

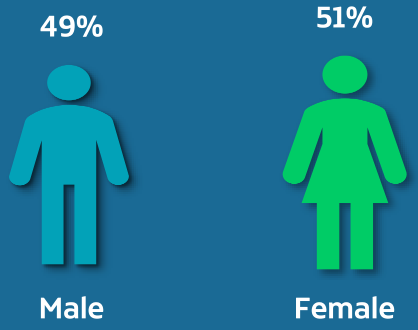
Sample - We spoke to a robust, nationally representative sample in Northern Ireland

Full sample n=400

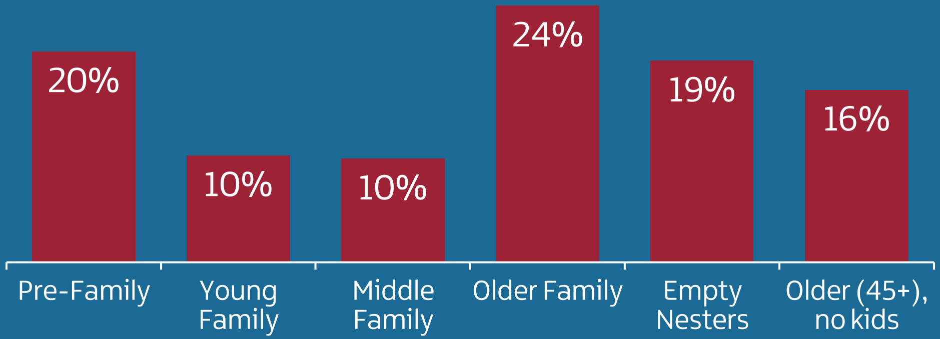
Age



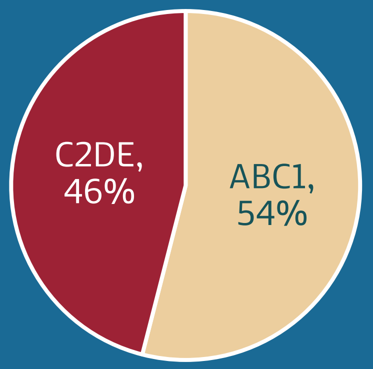
Gender



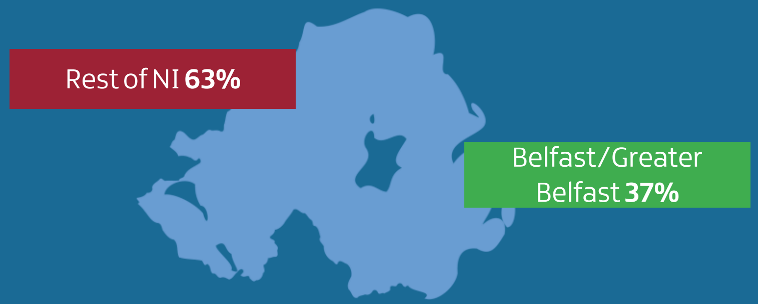
Lifestage



Socio



Region



Fieldwork was conducted between 22 March and 11 April 2023

Key takeaways

Trip intentions on the rise for next 3 months

- Compared to March 2022, there has been a significant increase in trip intentions for short breaks and day trips. 40% of people are now considering a short break in Northern Ireland in the next 3 months, up by 9 percentage points
- Long breaks remain stable when compared to this time last year. Trip intentions for summer are up across the board, with the one exception of long trips in NI, which drops relative to last year

Trip abroad intentions are high, but many have concerns about cost

- 52% of people are considering a break abroad in the next 6 months, particularly in July and August, with opportunity to experience a sunny climate as the key motivation
- However, 1 in 5 of the sample did not book a trip abroad because they thought it would cost too much (either researched and decided against, or ruled it out as an option altogether). This was more pronounced in 35-54/C2DE cohorts

VFM perception improves as people adjust to rising costs of living

- Despite the increasing costs, we see a recovery in the value for money net score, increasing from +3 to +11, suggesting that people are adjusting to rising costs.

Value for money

Value for money score increases somewhat for NI – still well ahead of Great Britain / ROI

Value for money

Net Score

	Poor value for money	Good value for money	Mar	Dec	Oct
Spain	6%	61%	+55	+34	+38
Portugal	7%	54%	+47	+31	
Northern Ireland	25%	36%	+11	+3	+3
Italy	23%	29%	+6	-2	-1
France	34%	26%	-8	-14	-7
Great Britain	34%	22%	-12	-13	-10
Republic of Ireland	44%	22%	-22	-28	-26

N = 400

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

Market comparison – Value for money

Value for money perception improves in both markets

- Net VFM score for NI among ROI residents is -3, an improvement vs previous wave
- **For those in NI this score also improves – now sits at +11, and has recovered from drop in October – possible sign that concerns around cost increases have dropped somewhat**

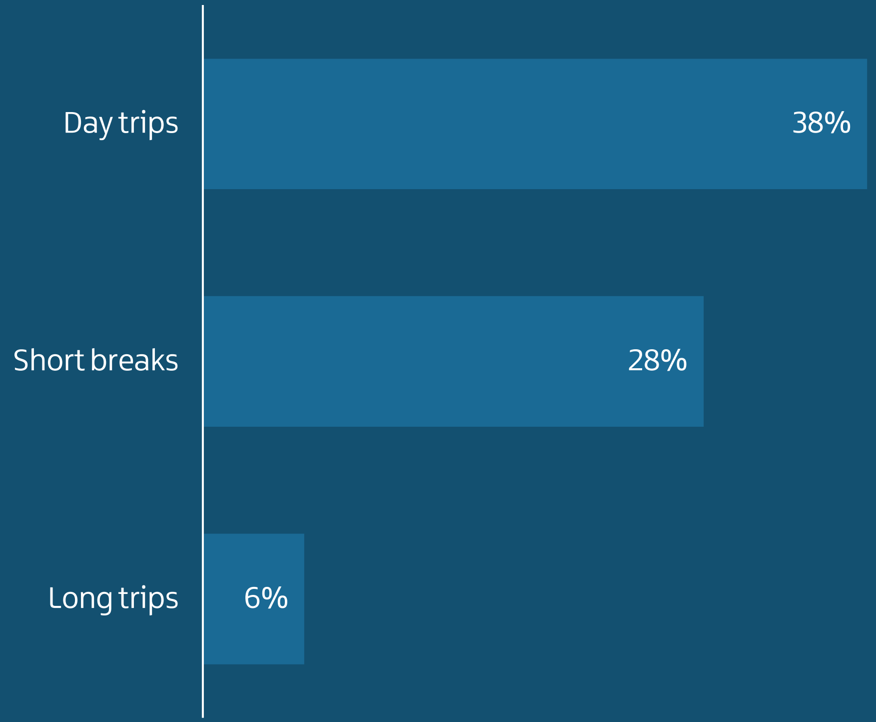
Travel experiences

3 in 10 have taken a trip in NI so far, as well as 2 in 5 taking day trips.

29%

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

% of total sample who took…



Other than NI…

36% didn’t travel at all

21% went abroad

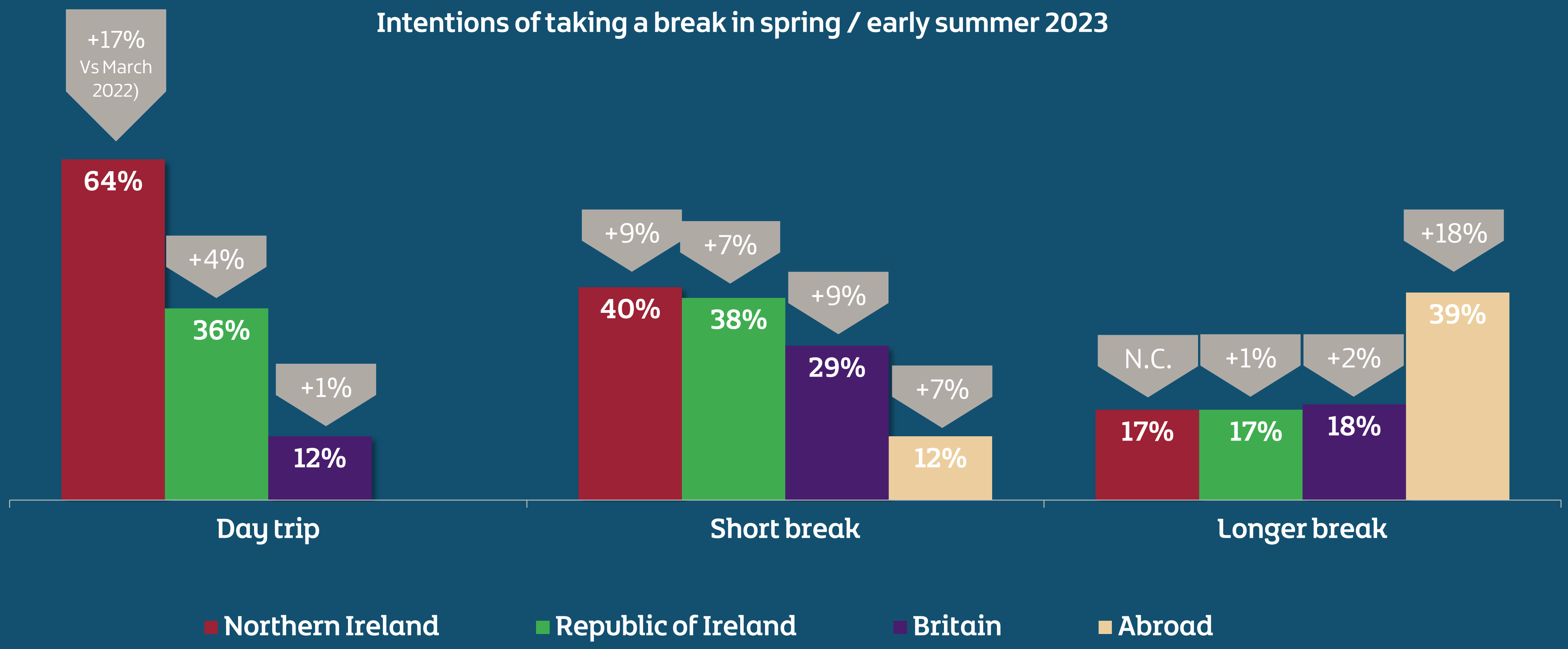
25% took a break in ROI

N = 400

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?

Travel intent

Day trip and short break intentions in the short term are much higher for NI than they were this time a year ago. Consideration for long breaks abroad increases



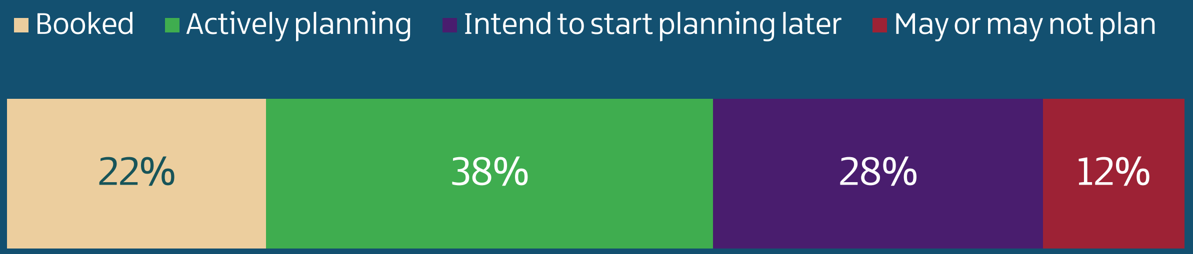
N = 400

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 next 3 months (April to June)?

2 in 5 are considering a NI short break, with most having booked or actively planning. May/June most popular times

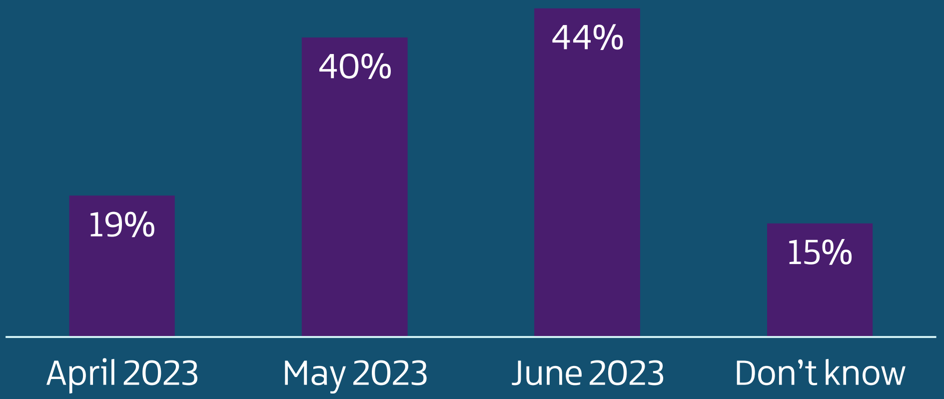
40%
are considering a **short break** in NI in April-June 2023

Amount of short break planned



60% are actively planning or have booked a trip to NI – 21% of the total sample

Short break planned for

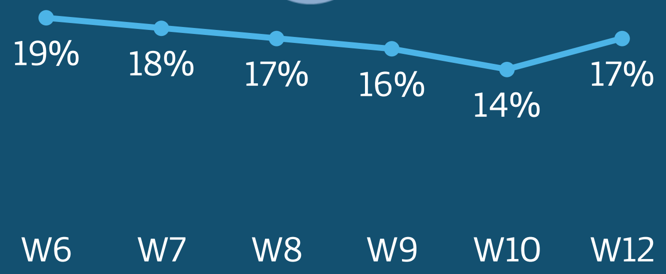


E1b. Would you consider taking a short break of at least 1-3 nights in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in April – June 2023?
E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland / E3. Have you booked or thought about planning this trip in Northern Ireland?

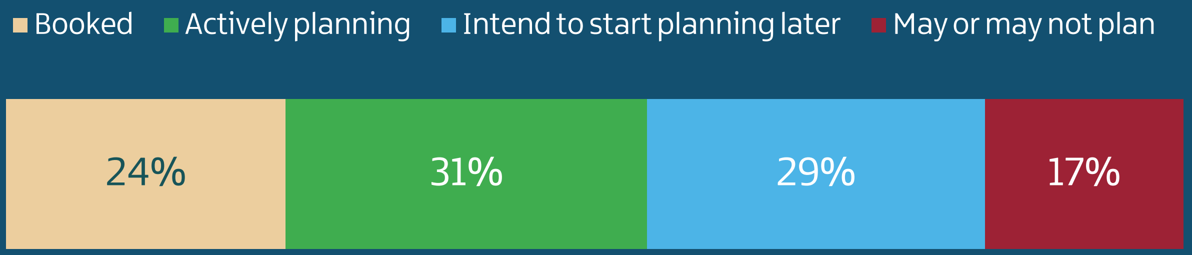
Long breaks most likely to take place in May/June – with most having booked or actively planning

17%

are considering a **long break** in NI in spring / early summer 2023

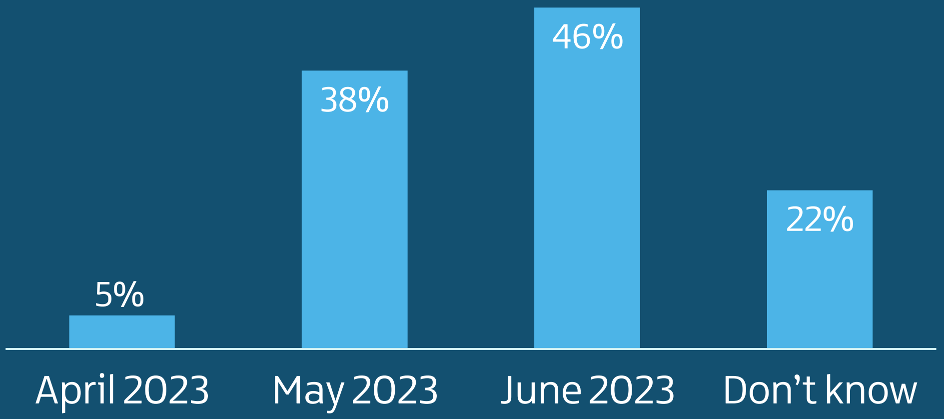


Amount of long break planned



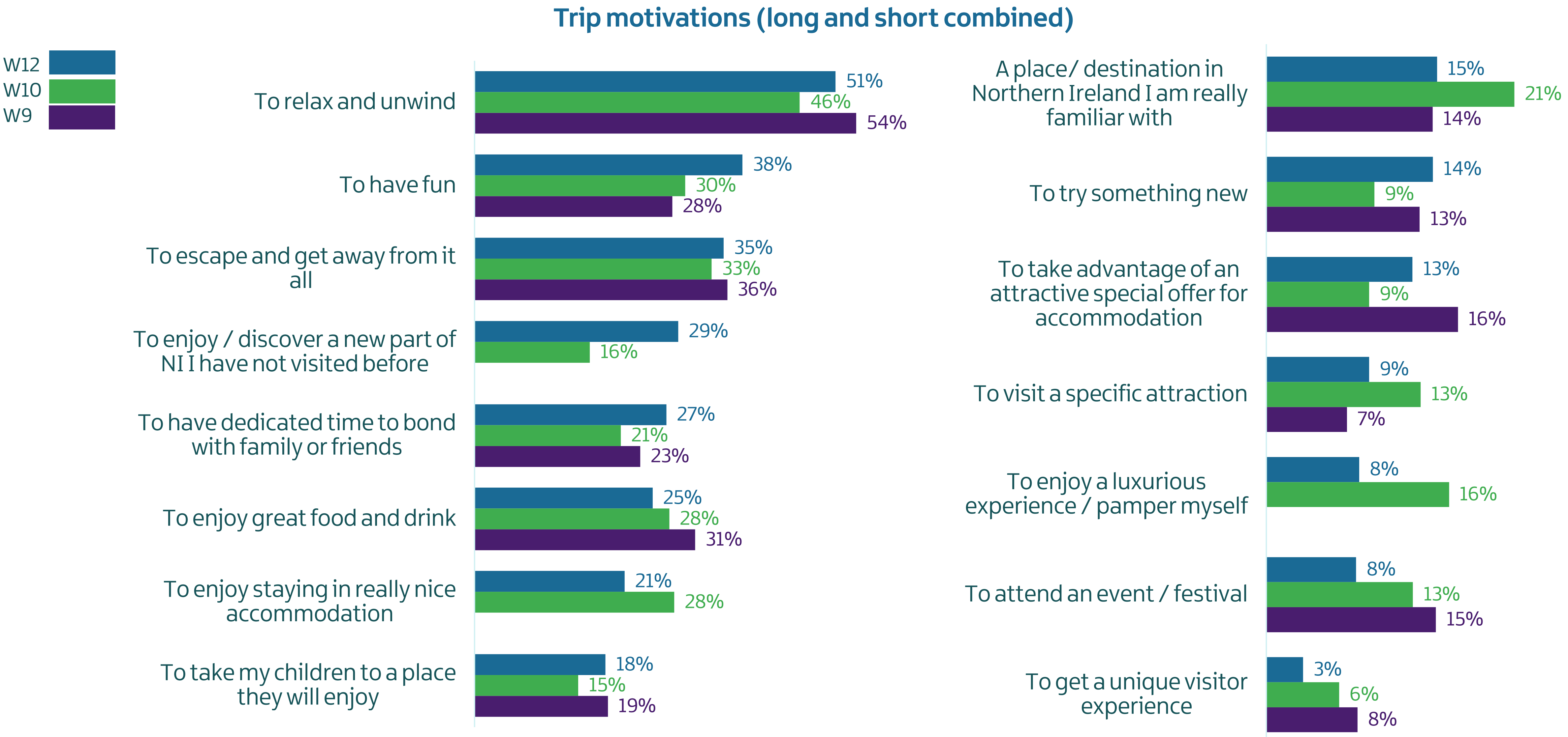
55% are actively planning or have booked a trip to NI – 8% of the total sample

Long break planned for



E1b. Would you consider taking a long break in Northern Ireland in April – June 2023?
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/ fun top two motivations – escapism remains an important factor, however 3 in 10 mention possibility of discovering a new part of NI

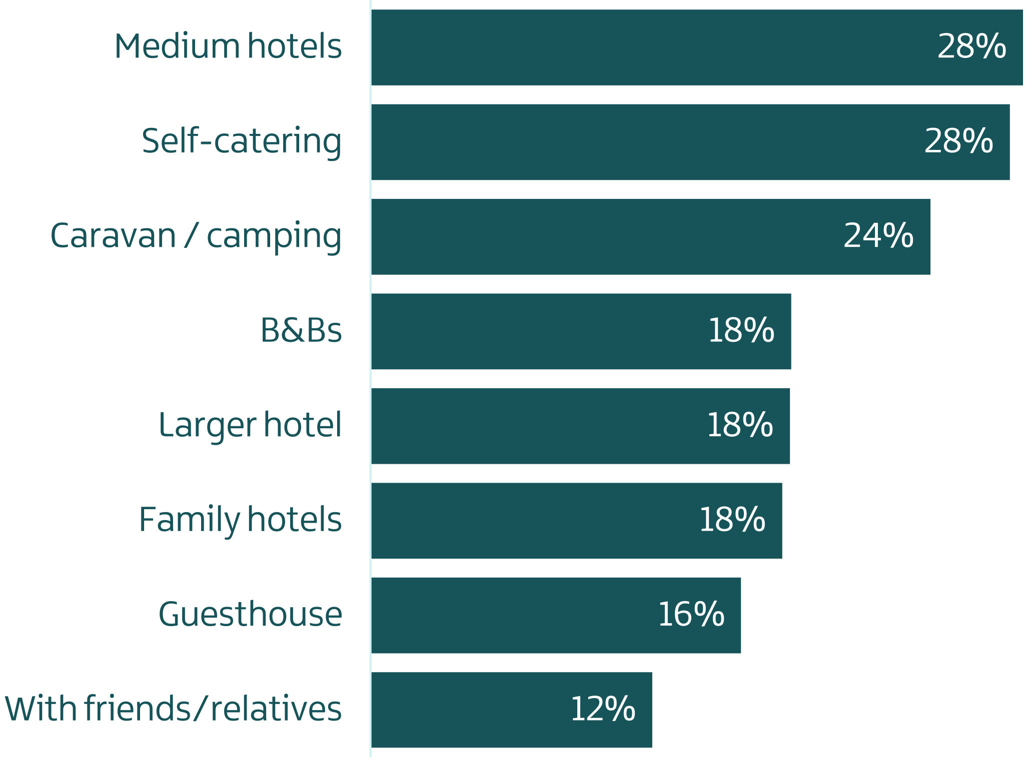


N = 151

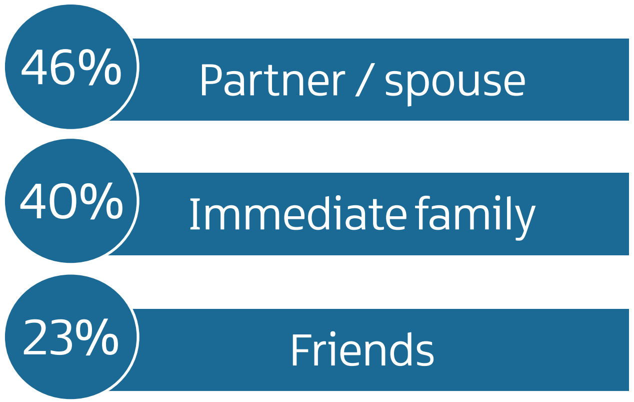
E4a. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the trip?

Many travelling with partners, with options like self-catering appealing to many at this time

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



Who travelling with (long & short combined)

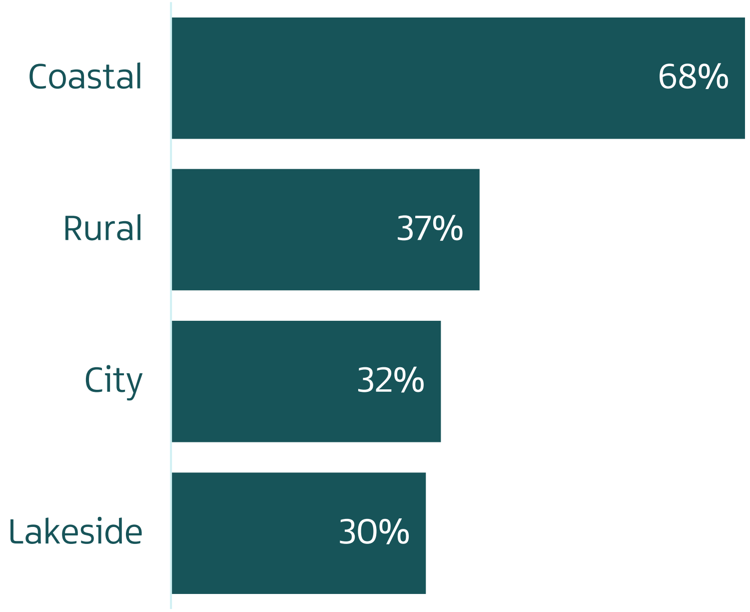


N = 151

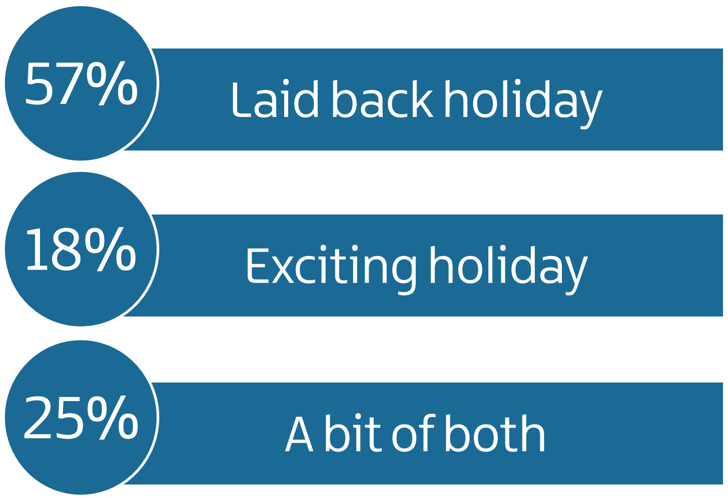
E5. Who do you intend on travelling/sharing your holiday(s) with?
E7. Thinking about your upcoming break(s) in Northern Ireland, what type of accommodation do you expect to stay in?

Coastal breaks the preference for many. Laid back holidays preferred too

Type of break preferred



Type of trip preferred

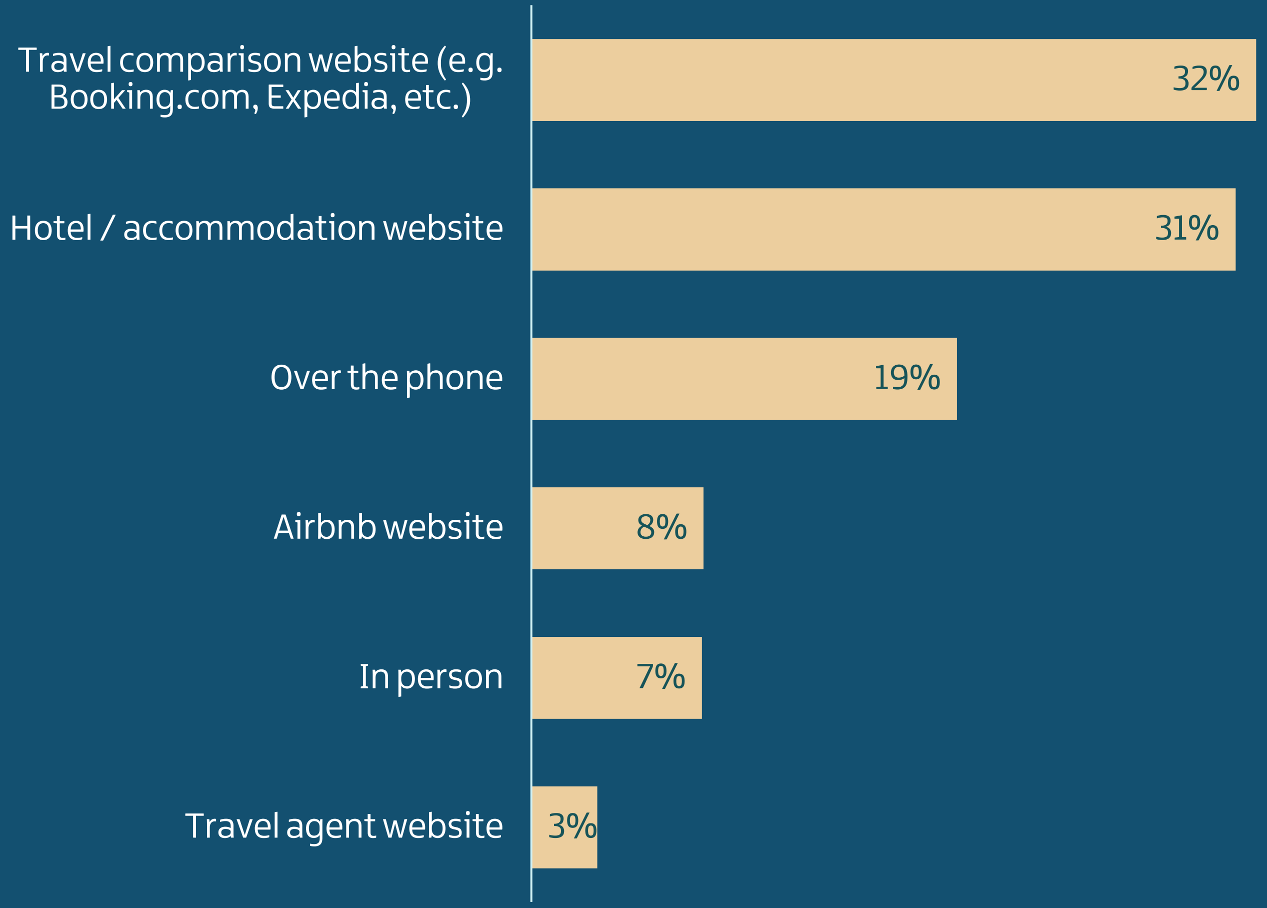


N = 151

E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer?
E36. Which of the following best describe your upcoming short break(s) or long trip(s) in NI?

Mixture of aggregators and hotel sites will be primarily used for booking – although older travellers more likely to book over the phone

How they plan to book their trip

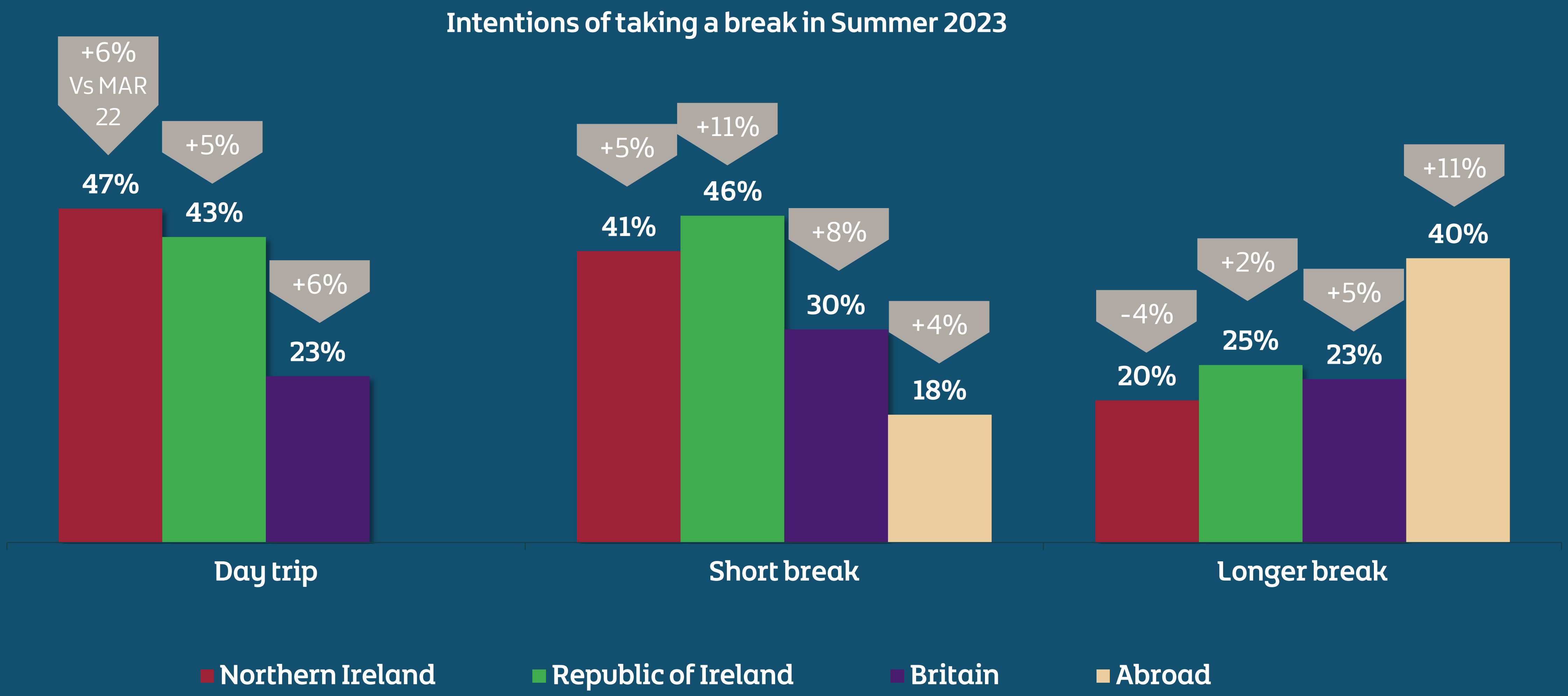


Over-55s more likely to book over the phone (41%)

N = 151

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

Travel intentions for summer are up across the board, both inside and outside of IoI, when compared to this time last year – the only exception being long breaks in NI, which fall back

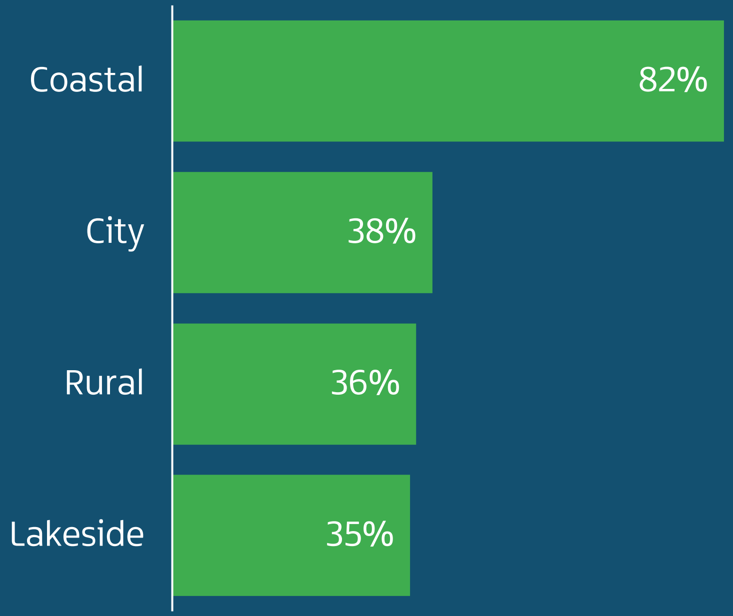


N = 400

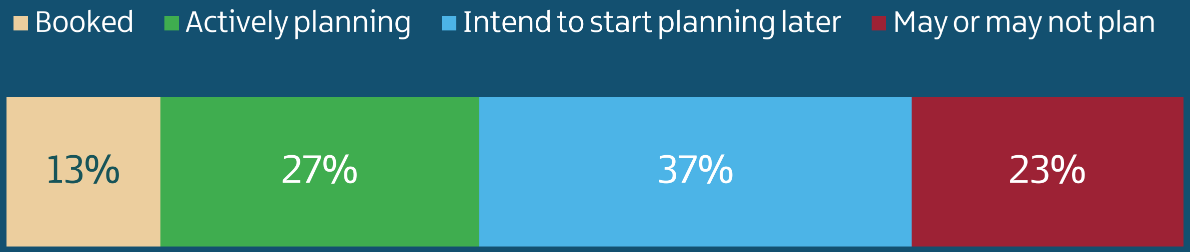
E24a. Would you consider taking any of the following types of trips in the Republic of Ireland, Northern Ireland or Britain in summer 2023 (July to August)?

For trips in summer, coastal breaks are more likely to be considered than earlier in the year. Reasonable number already actively planning

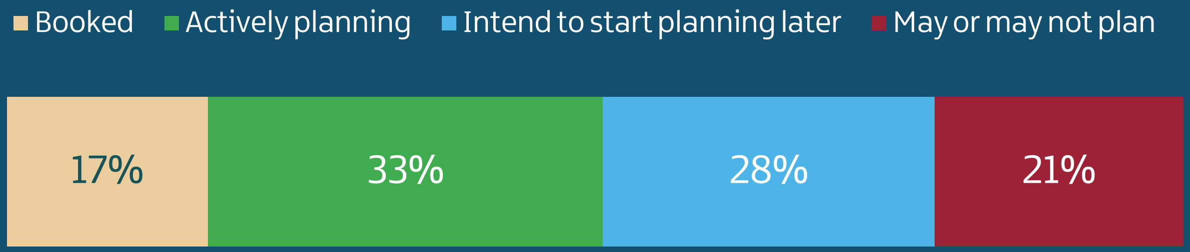
Type of break considered



Amount of short break planned



Amount of long break planned



N = 194

E24c. Which of the following destination types would you consider this summer (i.e. July to August)? / E25. Thinking about your upcoming trip in Northern Ireland, have you booked or thought about planning this trip?

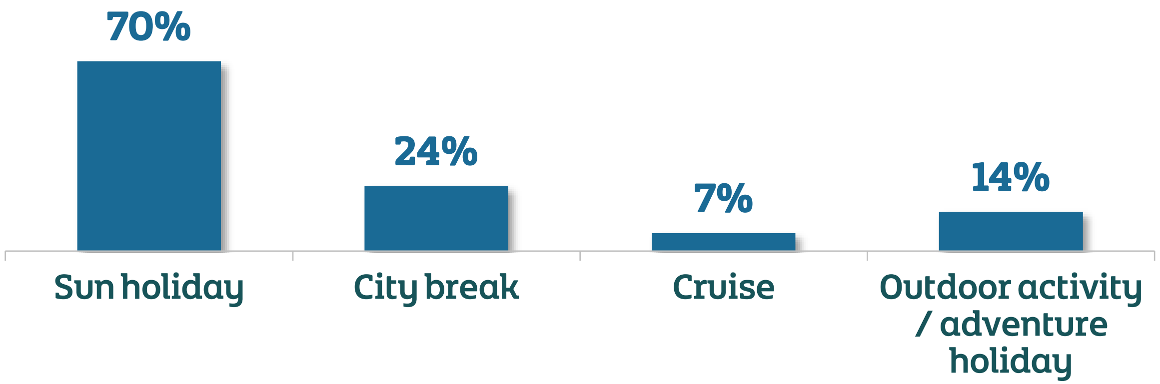
Just over half planning holidays abroad – July and August will be the key months for travel abroad. Most have already booked or are actively planning their trips

52% of total sample are considering a break abroad in the next 6 months

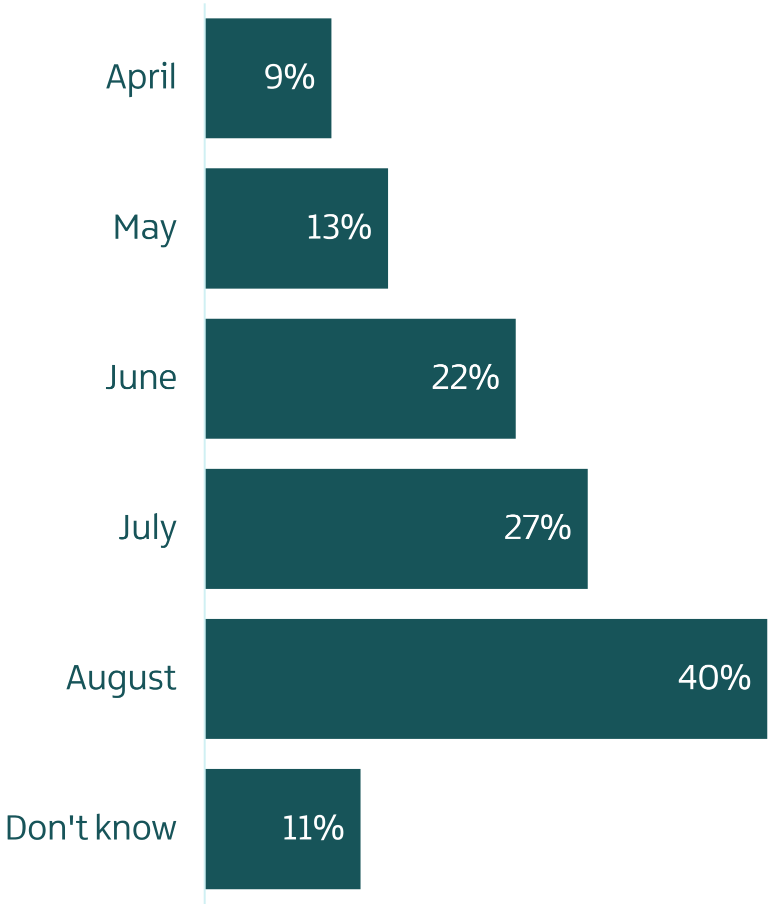
64% of this cohort are actively planning or have booked their trips

When compared to a year ago (March 2022) this is up 15 percentage points from 37% - but down slightly vs. December 2022

What type of trip are you considering?



When trips abroad are planned for

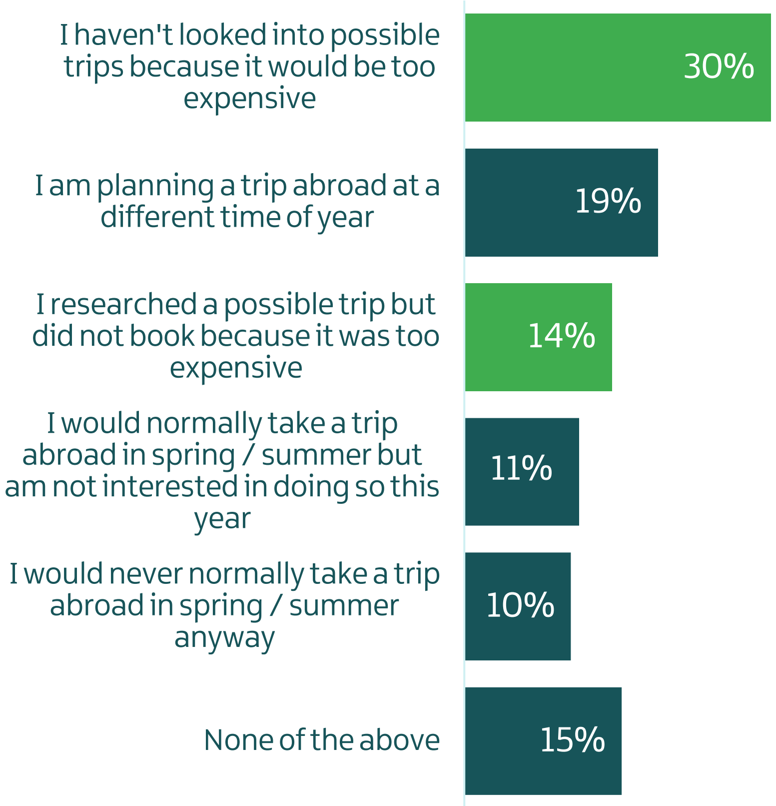


E29. In which of the following months are you considering travelling? / E14. Have you booked or thought about planning this trip abroad? / E15New. What type(s) of holiday or short break abroad are you considering?

Climate top factor for trips abroad – many also looking to relax, escape, have fun. Of those who didn't book a trip abroad, 44% said cost was a factor

Trip abroad motivations

Why not planning trip abroad this spring/summer



Number saying they haven't booked because of cost represents 20% of total sample. Higher with 35-54s (25%), older with no kids (27%), C2DEs (25%)

E15bNew. What has encouraged you to consider a holiday or short break abroad this spring / summer (March to August)

E14c. You mentioned that you are not planning a break abroad this spring / summer (March to August). Which of the following best describes your reasons for not taking a break abroad?

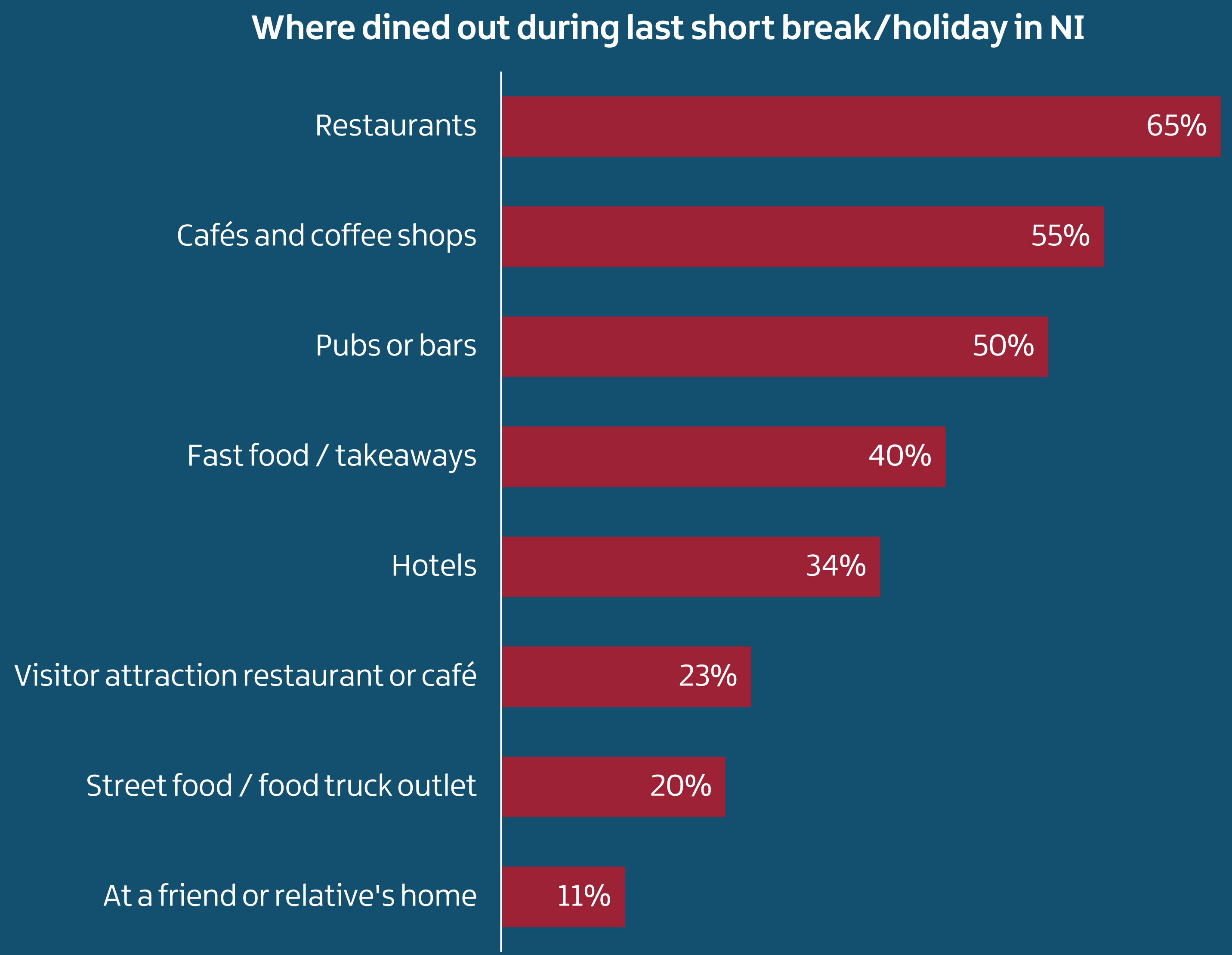
Market comparison – Trip expectations

Long trip intentions down, short / day trip intentions up in both markets vs. this time last year

- Day / short trips see intentions increase slightly in ROI and significantly in NI vs. March 2022 (40% NI residents are likely to take a short trip in next 3 months vs. 31% last year)
- **However long trip intentions drop in both markets – likely due to post-Covid re-emergence of trips abroad**

Food & Drink

Restaurants, pubs / bars, hotel the top 3 places they ate out during their last short break or holiday in NI

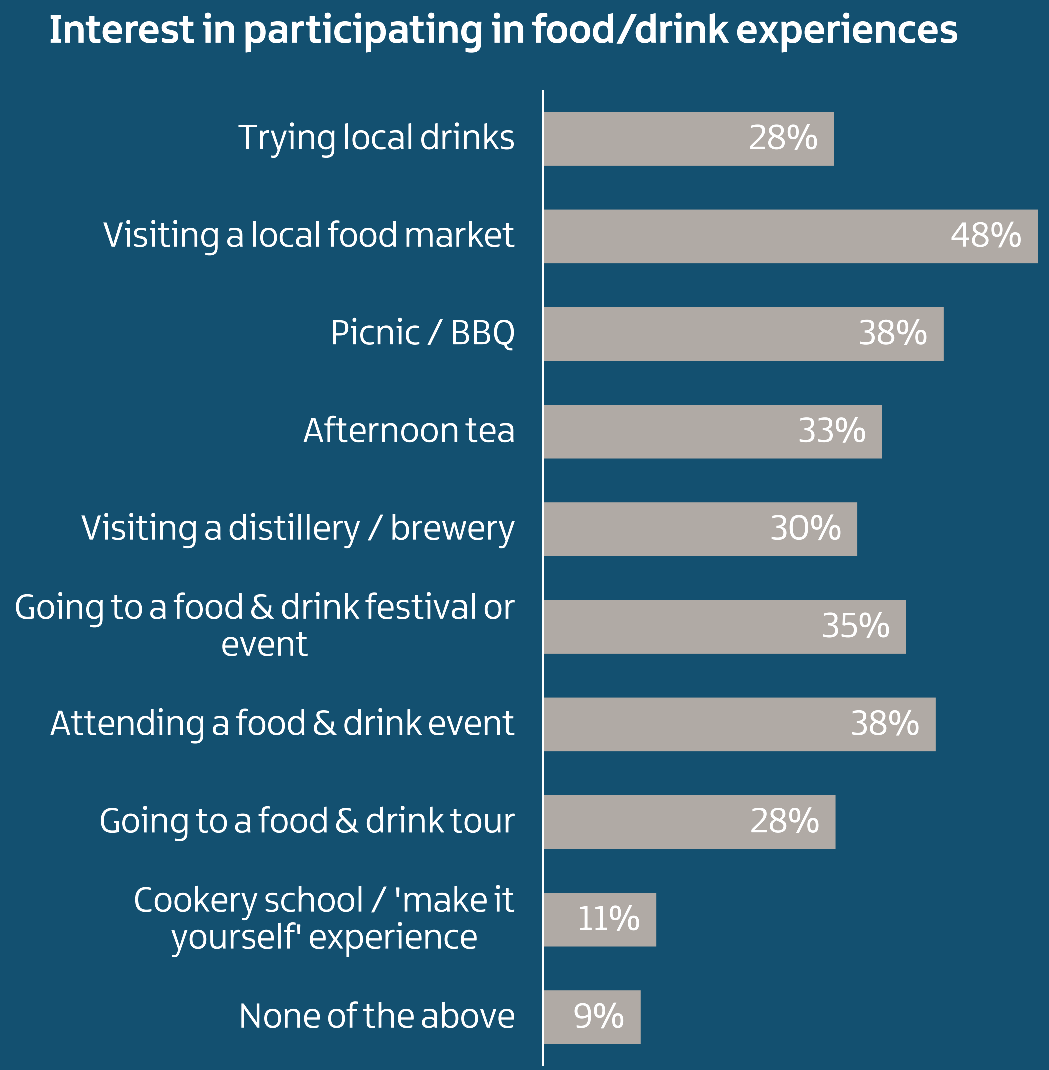


18-34s more likely to have eaten at street food/food truck outlet (27%)

N = 306 (those who have taken a break in NI in the past 3 years)

K1. Which, if any, of the following did you eat out in during your last short break or holiday in Northern Ireland?

For those in NI, festivals/ events for food and drink have significant interest but are not attended by many – worth increasing exposure to these

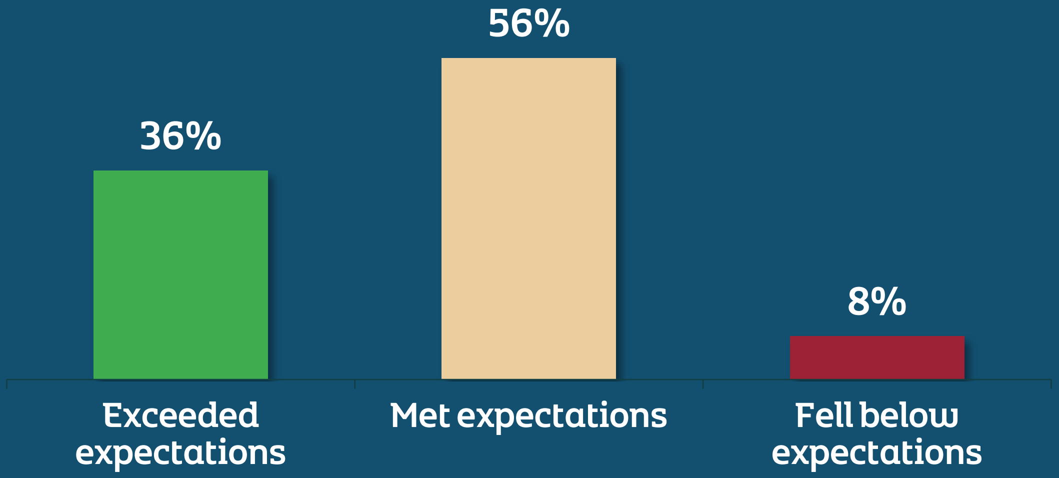


N = 306

K2. And which, if any, of the following food & drink experiences did you participate in?
K3. If you were to take a short break or holiday in Northern Ireland in the future, which of the following would you be interested in?

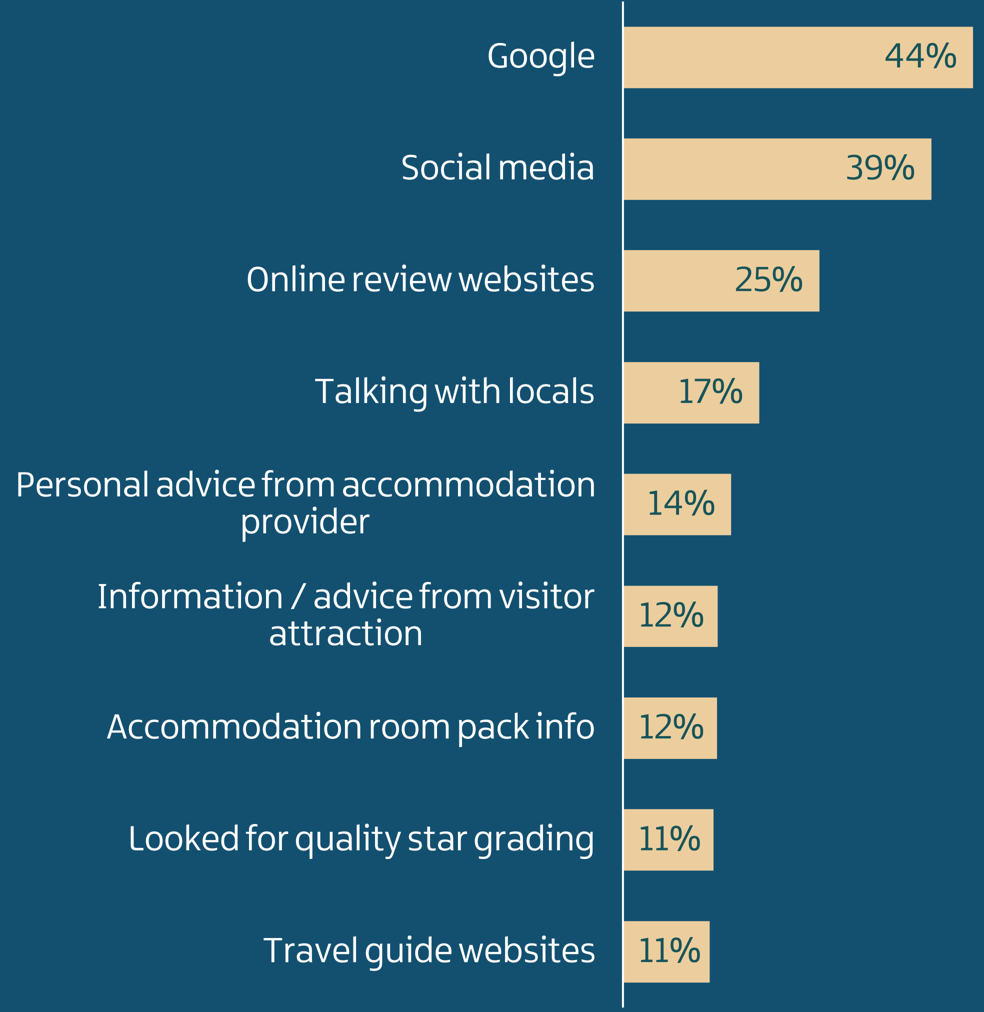
92% say food experience met or above expectations. 1 in 3 book meals out before their trips in NI

Food experience at accommodation versus expectations



Research/booked places to eat before short break/trip

Sources of information to choose places to eat out (10% or higher)

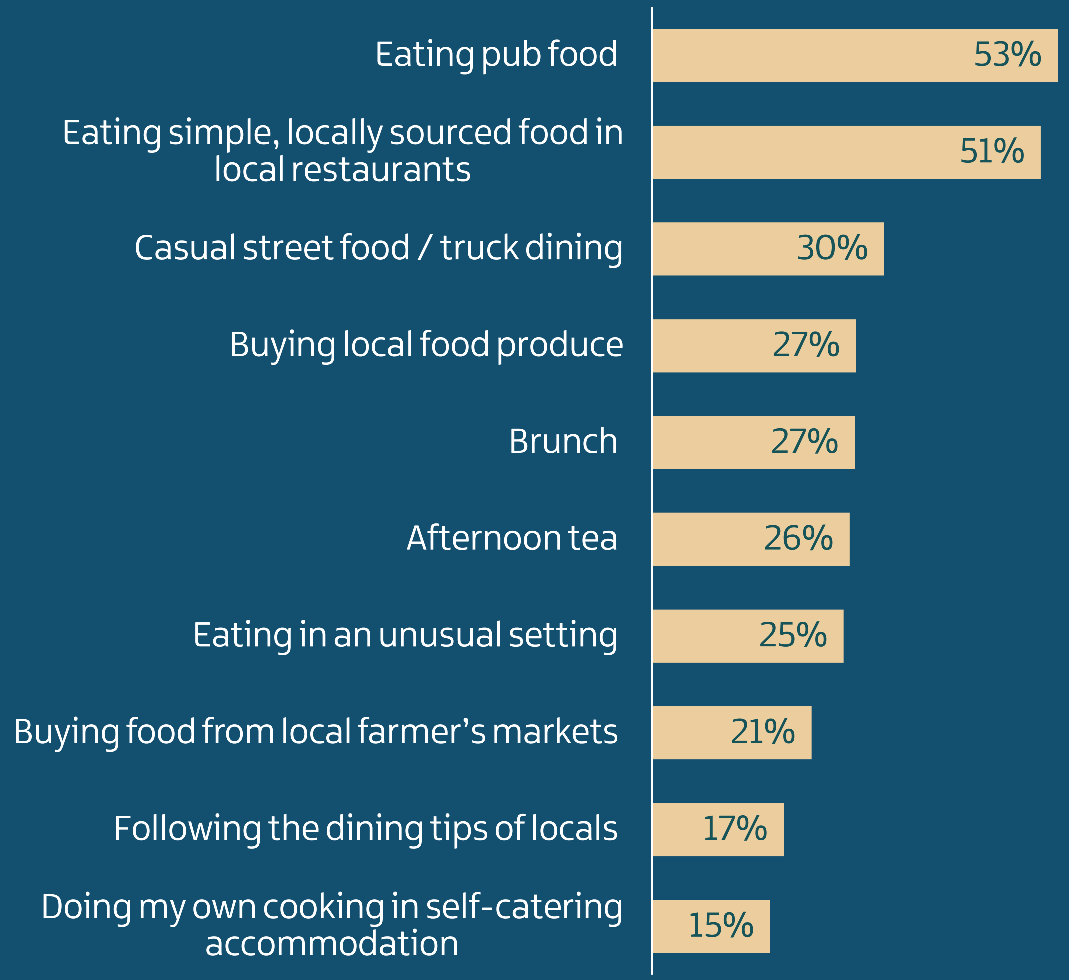


K12. Thinking again about your accommodation, did the quality of the food experience at your accommodation meet your expectations?
K13. Did you research or book places to eat before your last short break or holiday in Northern Ireland?
K14. Which, if any, of the following sources of information did you use to help choose places to eat out?

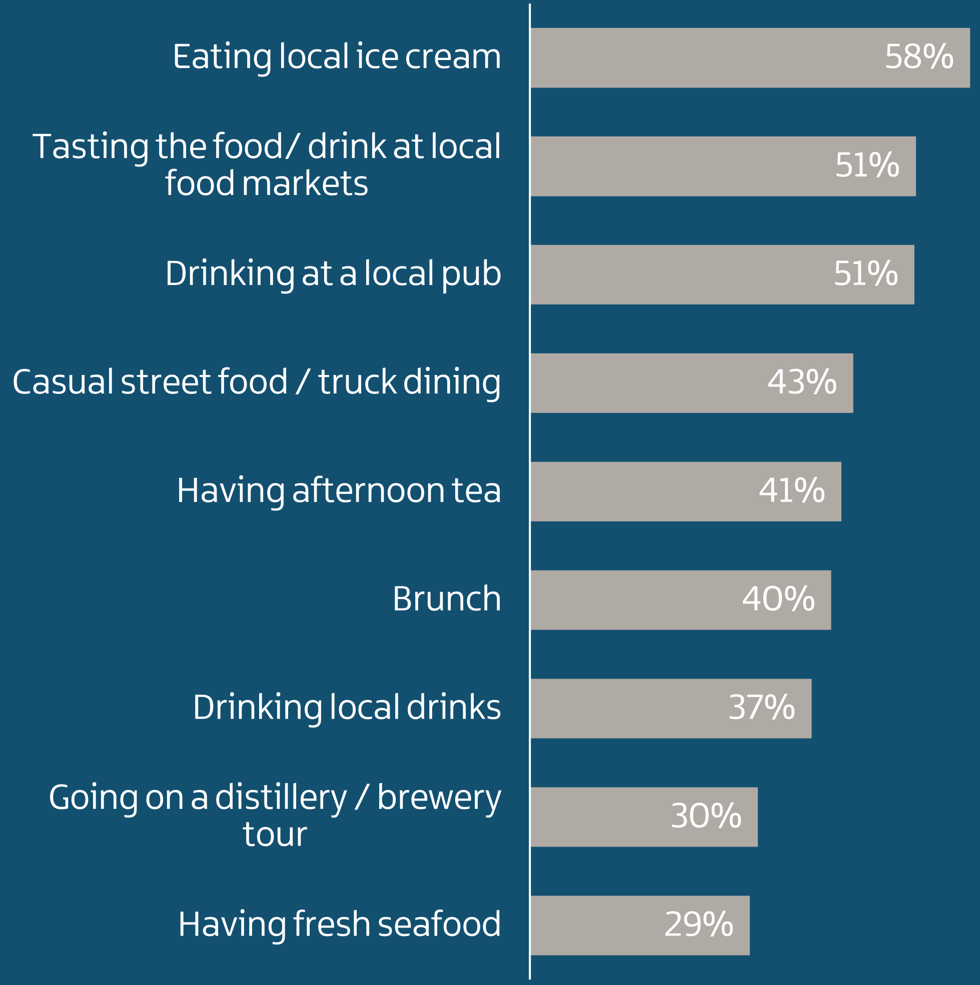
N = 201 stayed in serviced accommodation

Looking at total sample, simple local experiences are preferred – pub food, ice cream, food markets. There is some interest in other experiences as well

Food & drink experiences they would like to try in future (total sample)



Activities that would appeal to them



N = 400

K15. Which, if any, of the following types of food & drink experience do you think you would most look forward to enjoying if you were to take a short break or holiday in Northern Ireland in future? K16. And which, if any, of the following activities do you think would appeal to you?