

# Consumer Sentiment ROI Market February 2021



tourism  
northernireland



# Research background and objectives



# Research Background & Objectives

With the third wave of the consumer sentiment barometer, we have assessed the evolving 'consumer mood' towards Covid-19.

## The research objectives:

Determine the current consumer sentiment towards Covid

Explore current attitudes towards travel

Assess the impact of the roll out of vaccines on travel intent





# What was happening during fieldwork?

FW Dates 2<sup>nd</sup> Feb – 15<sup>th</sup> Feb

Case Numbers  
Falling



5<sup>th</sup> Feb

**HSE plans to vaccinate over-70s at large GP practices and dedicated centres**

Decision to use Pfizer and Moderna vaccines on those over 70 leads to 're-tooling' of plan

© Fri, Feb 5, 2021, 01:00

11<sup>th</sup> Feb

**Prolonged lockdown restrictions on the cards 'until the Easter period', says Taoiseach**

7<sup>th</sup> Feb

**AstraZeneca vaccine less effective against South African variant – study**

Oxford vaccine shot offers only limited protection based on early data from trial

© Sun, Feb 7, 2021, 07:35

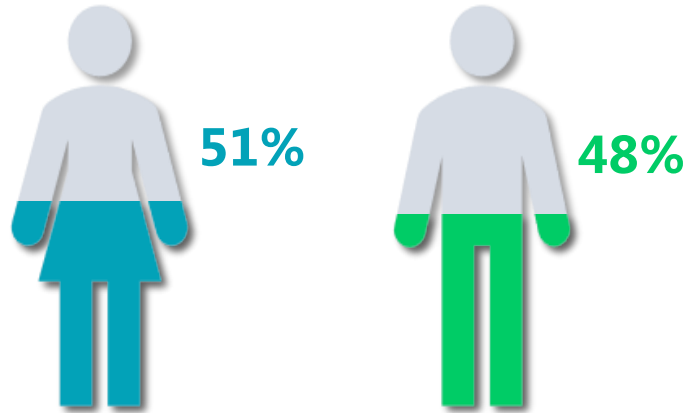
**Ireland has third highest rate of vaccine rollout in EU says Reid**



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

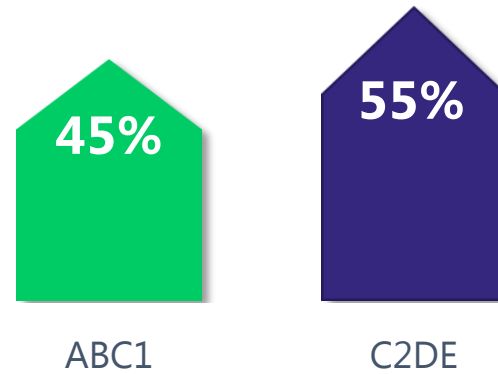
Total sample = 750

## Gender

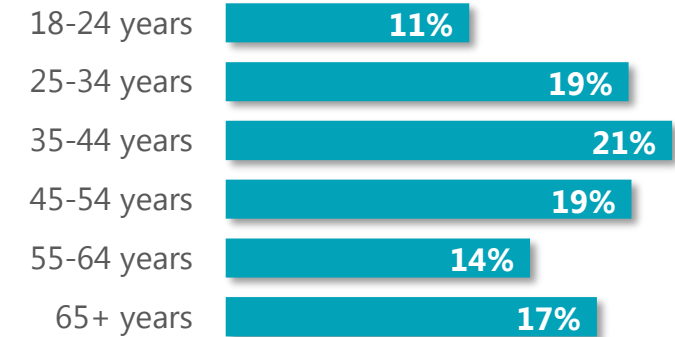


1% prefer not to say/ describe as something else

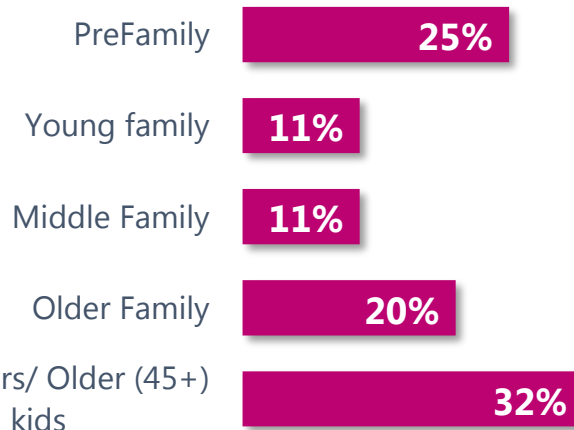
## Social Grade



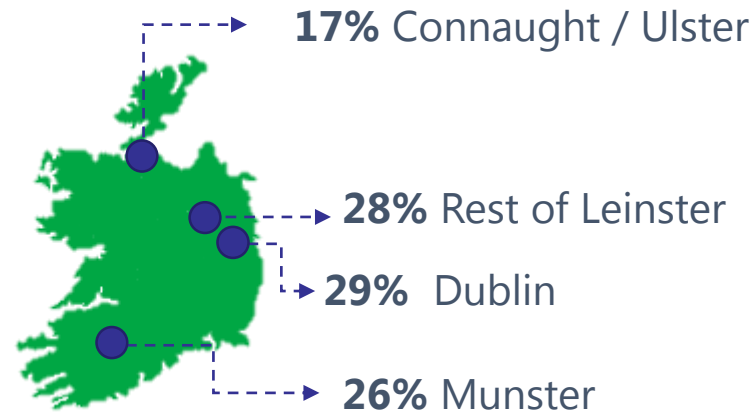
## Age



## Life-stage



## Region



Base n = 750

For analysis purposes, we have pulled out three key segments



Active Maximisers

25%



Open to Ideas

43%



Open-Minded Explorers

32%

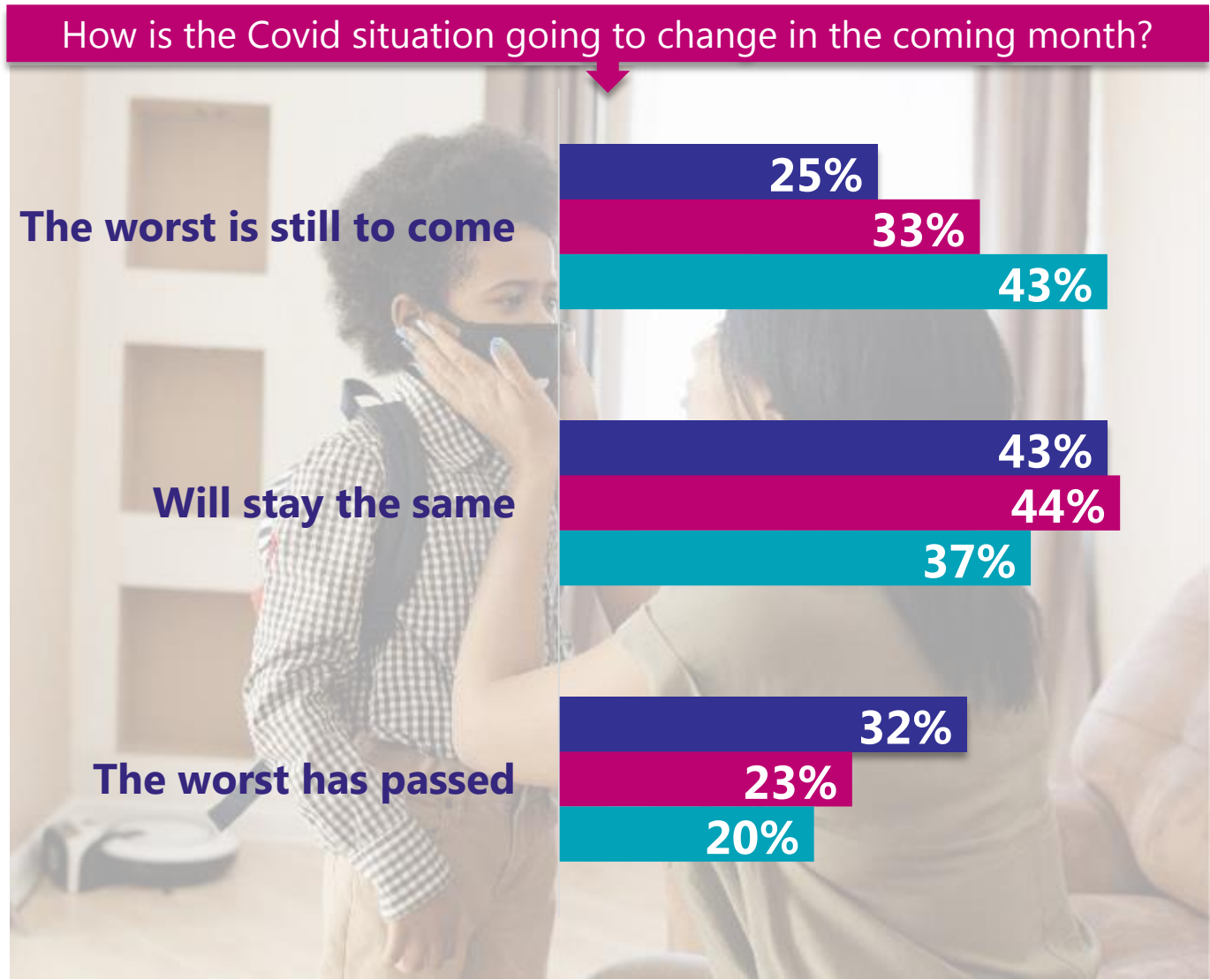


# Covid-19 and Tourism

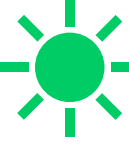


# Optimism in the Republic of Ireland has gradually improved over the 3 waves – **TNI should tap in to the rise in optimism**

Wave 3  
Wave 2  
Wave 1



**More negative outlook** among **young families** (34%) 

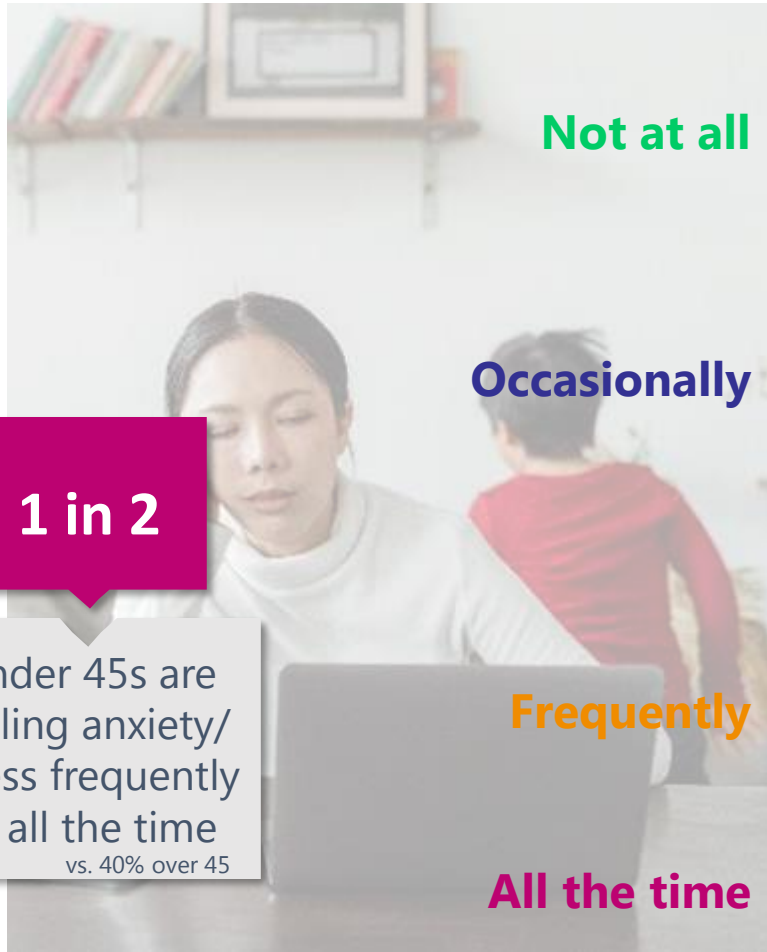
**More positive outlook** among **over 65s** (41%) and **males** (36%) 

Base n = 750



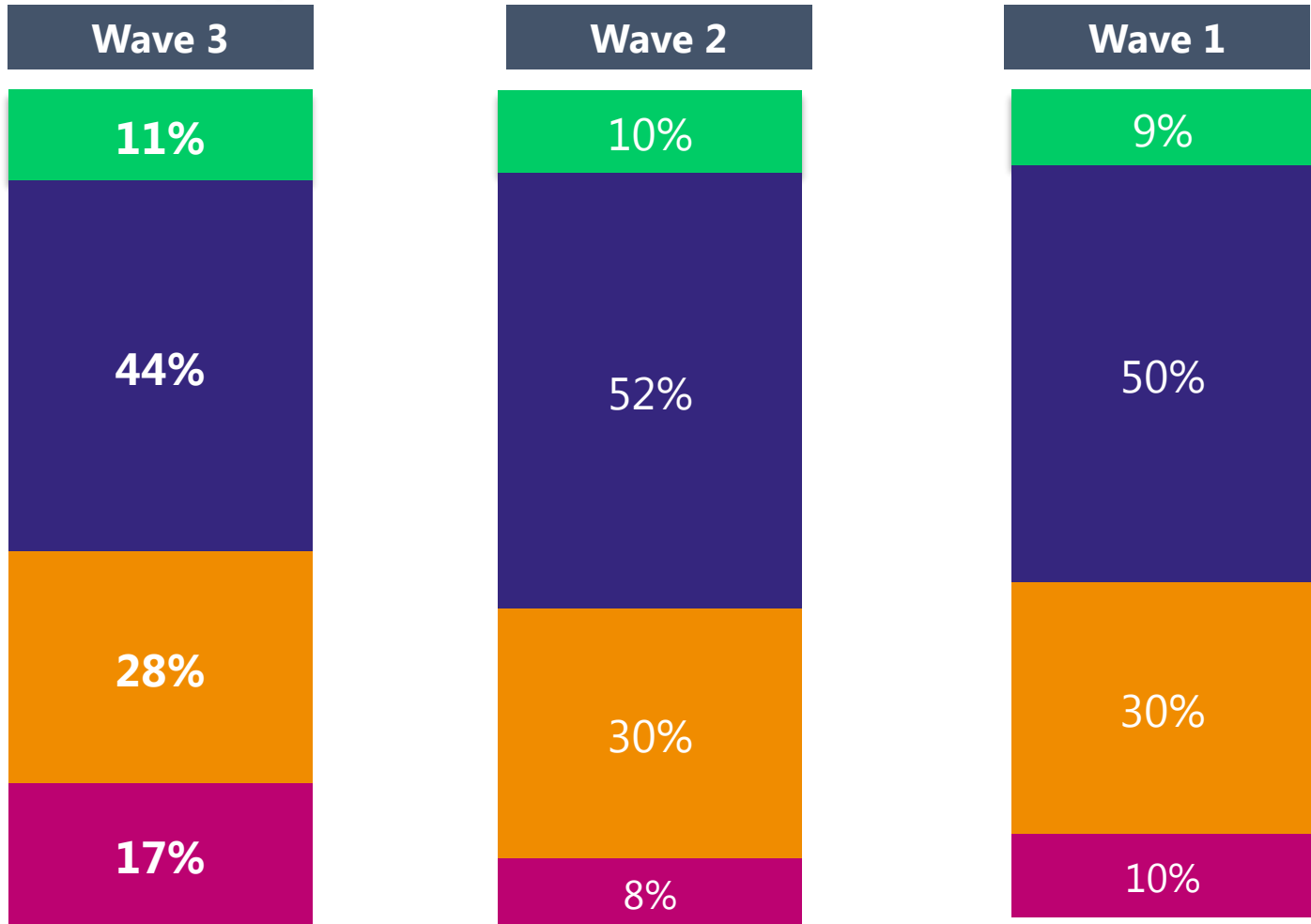
# Anxiety levels have risen since the last two waves – **promoting NI holidays as an opportunity to de-stress will be effective**

Stress/Anxiety levels during Covid



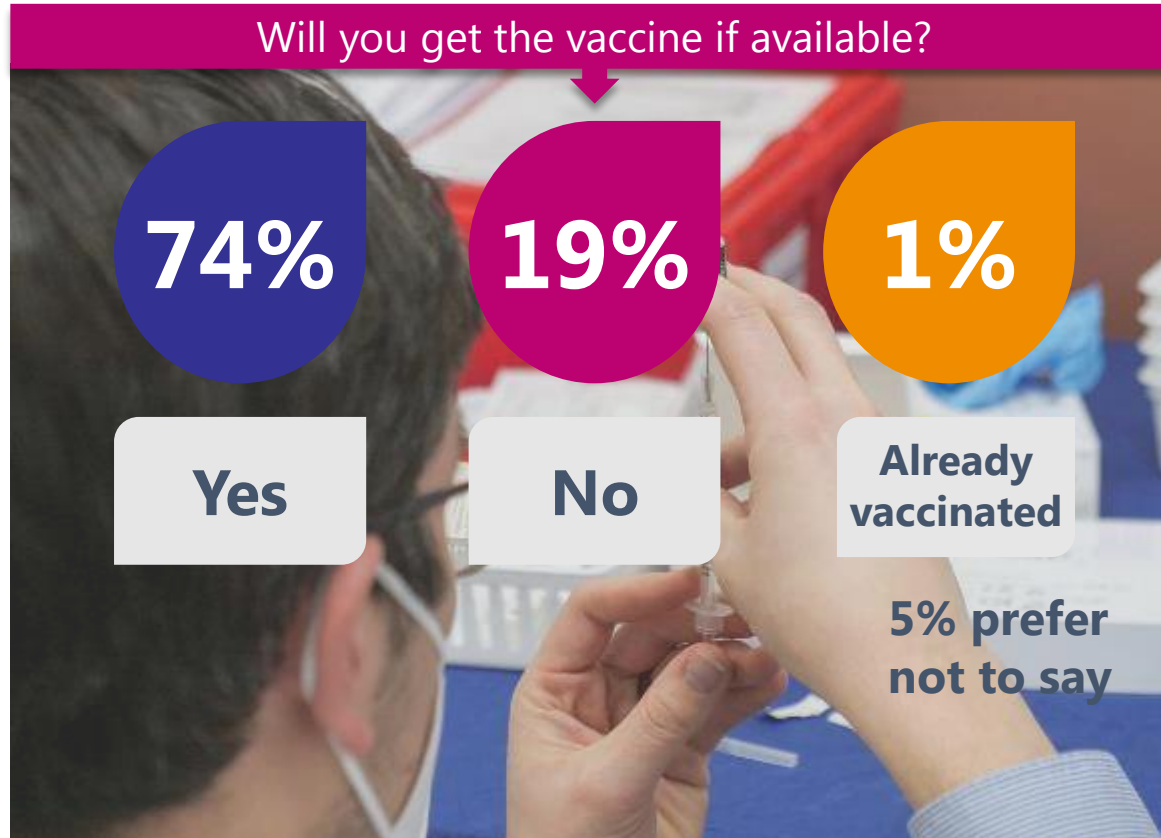
**1 in 2**

Under 45s are feeling anxiety/stress frequently or all the time vs. 40% over 45



N = 750

# Vaccine best medicine to improving confidence



# Market Comparison

## Covid-19 & Tourism

Optimism has returned to the Island of Ireland and stress levels are similar in NI and ROI

Willingness to get Covid-19 vaccine slightly higher in Northern Ireland

NI Residents 80% Vs ROI Residents 75%\*

*\*willing to get vaccine/have already received vaccine*



# Current Attitudes towards Travel



# Openness to exploring NI holiday ideas this year is relatively low

## NI needs to create compelling alternative to ROI staycation

### Attitudes Towards Tourism

I would only **book a holiday on the island of Ireland** this year if there were **flexible booking arrangements** for cancellations

I am open to **exploring ideas** right now for a holiday in ROI this year

I would only book a **holiday abroad** this year if there were **flexible booking arrangements** for cancellations

I am going to do **more staycations** this year than I did last year

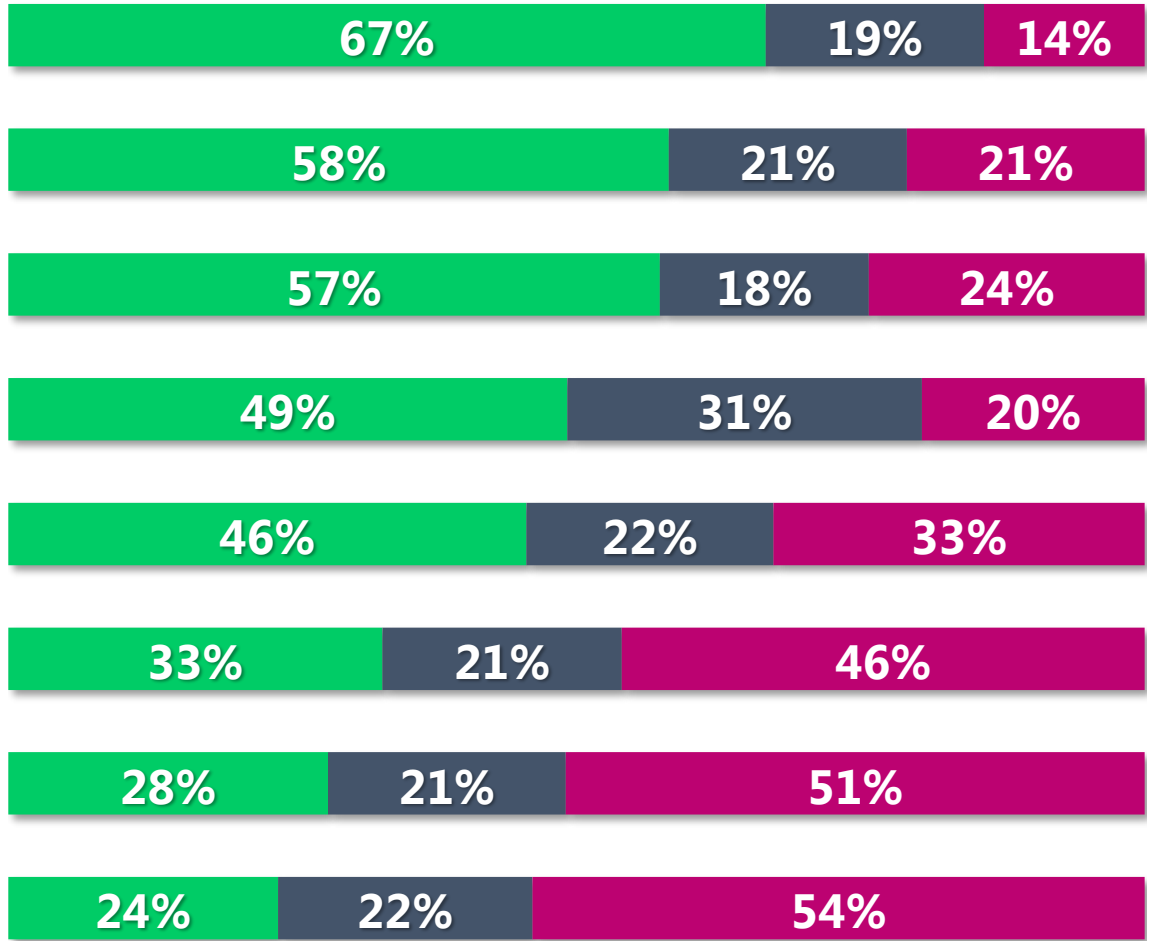
I stayed at home in 2020 so I would like travel abroad this year

I am open to **exploring ideas** right now for a **holiday abroad** this year

I am open to **exploring ideas** right now for a holiday in **Northern Ireland** this year

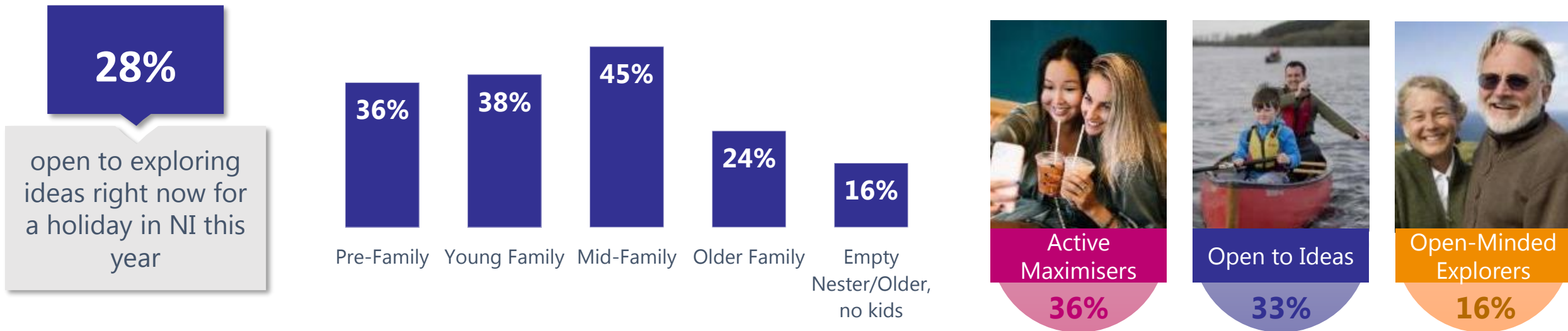
The pace of the **roll out of the Covid-19 vaccine** makes me feel **confident about going on a holiday abroad** this year

■ Agree ■ Neither ■ Disagree



While openness to exploring ideas for an NI holiday is relatively low, it is significantly higher amongst younger cohorts – **TNI need to tap into their openness**

Openness to Explore ideas right now for a holiday in Northern Ireland this year





## Desire to travel abroad this year

**46%**  
stayed at home in 2020  
so would like travel  
abroad this year

**Highest Amongst**

**58%** 18-24 year olds

**56%** Dublin

**54%** Mid-Family

**53%** ABC1s



**Lowest Amongst**

C2DEs– 39%

55+ years– 38%

Pent up demand for holidays abroad high amongst younger groups & those living in Dublin

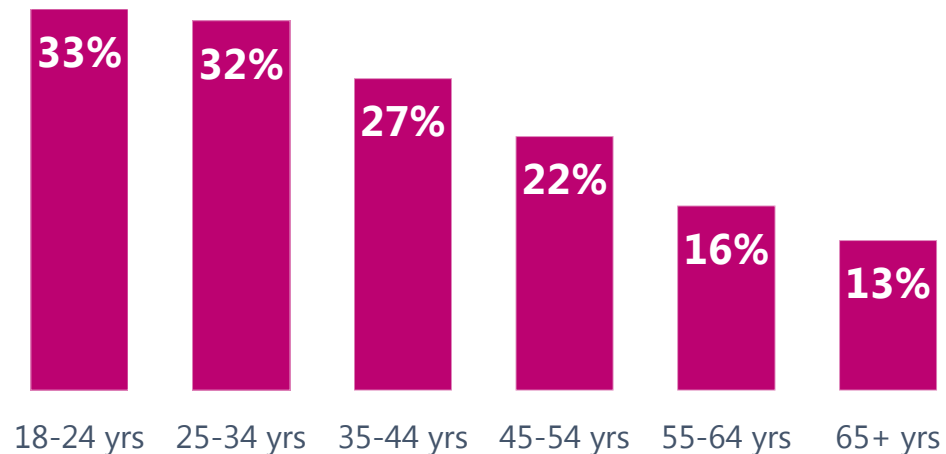
**Efforts need to be made to ensure we don't lose this captive market**

# Confidence of younger groups and families likely to be influenced by their strong desire to start travelling abroad again – **need to compete strongly here**

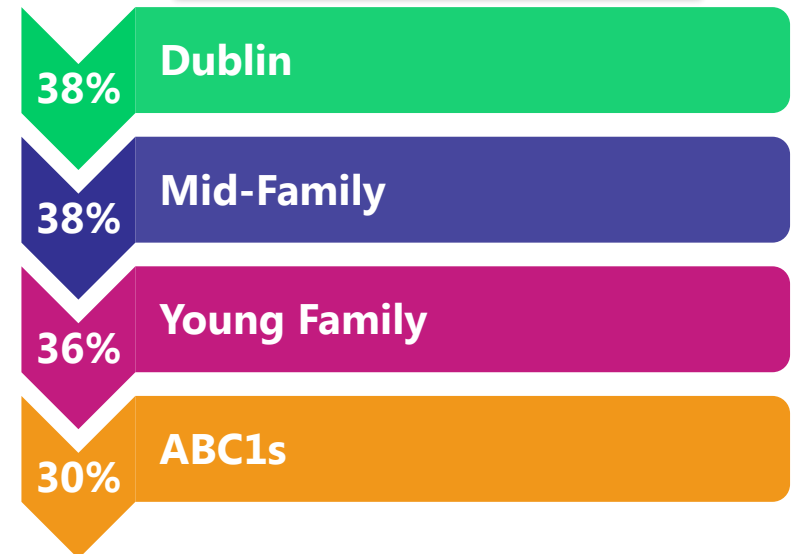
## Vaccine role out makes them confident about going on a holiday abroad this year

24%

Feel pace of the roll out of the Covid-19 vaccine makes them feel confident about going on a holiday abroad this year



### Highest Amongst

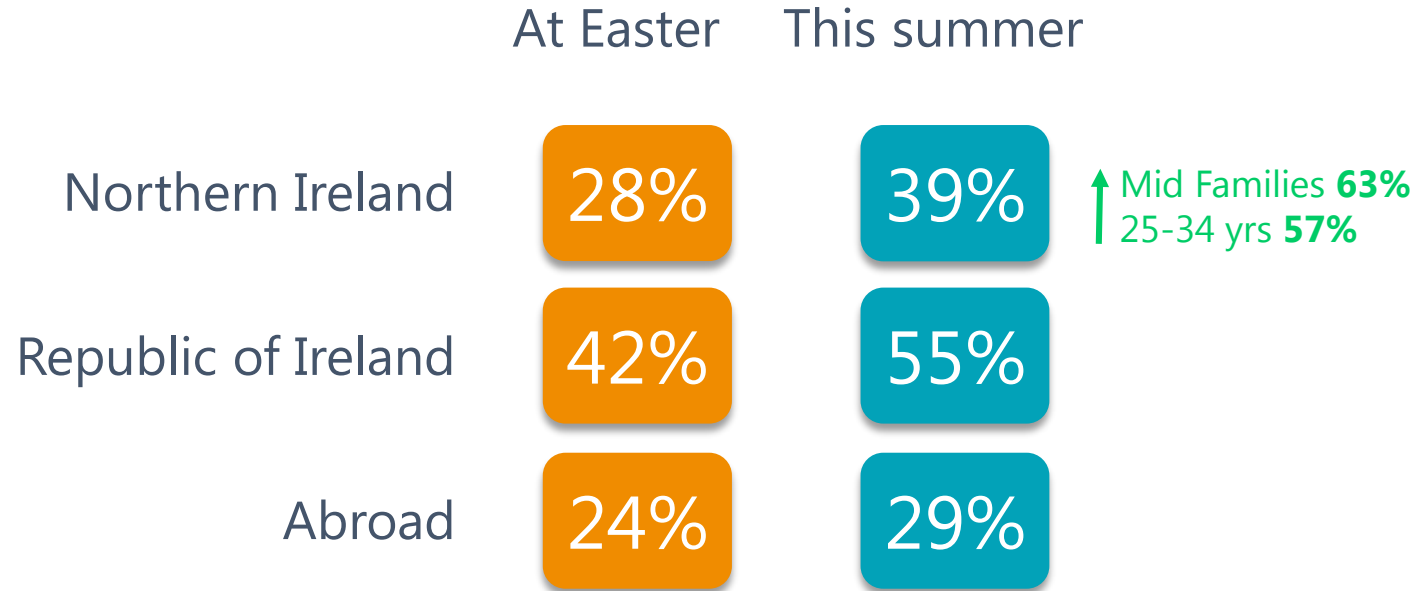


Reassurance that Northern Ireland is a safe destination to travel will be vital in encouraging travel

Mid-Families a core target - more likely to see NI as a safe destination to take a break in

N = 750

How safe would it be to go on holiday in...



Q7. How safe do you think it would be to take a holiday or short break in each of the following locations around Easter time (i.e. the beginning of April)? / Q8. How safe do you think it would be to take a holiday or short break in each of the following locations during the summer months (i.e. May - September)?



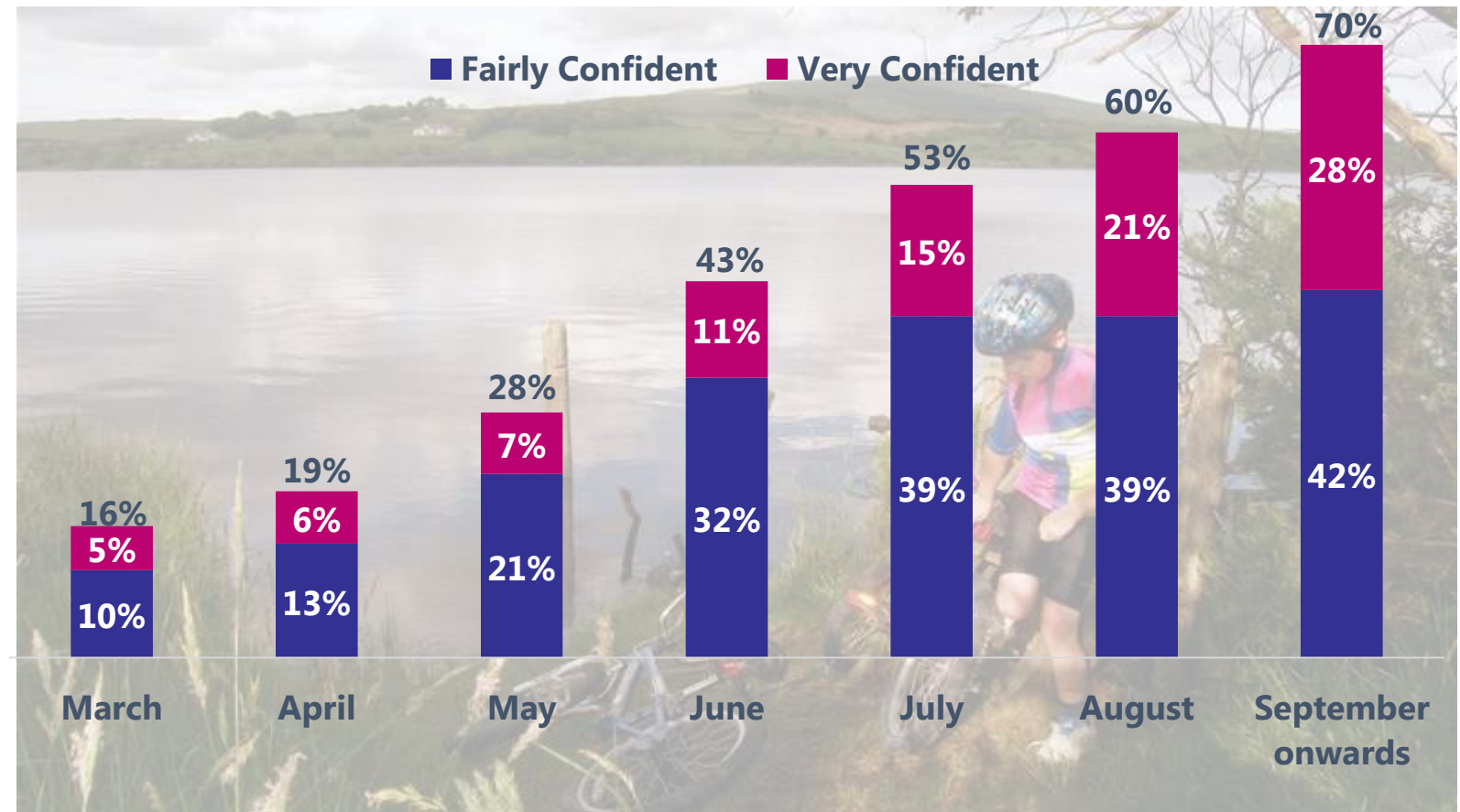
# Confidence starts to pick up towards the end of the summer

## Gradually ramp up comms from Spring to Summer

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

**Its not until Sept onwards before 70% will be confident that they will be able to go on a break on the IoI**

Highest amongst those living in Dublin (79%), young families (79%) & mid families (80%)

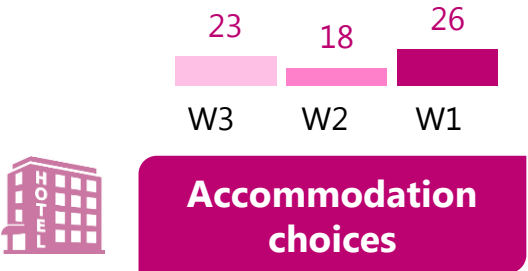
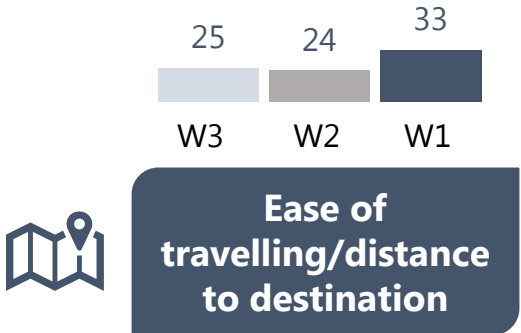
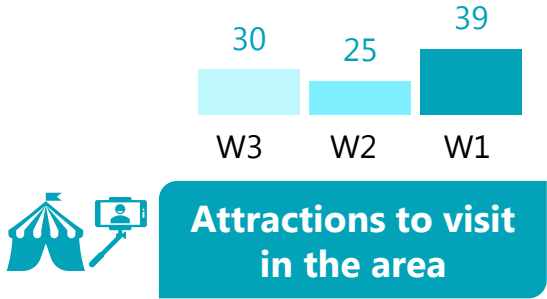
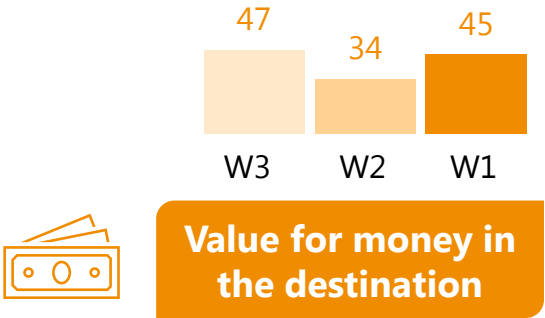
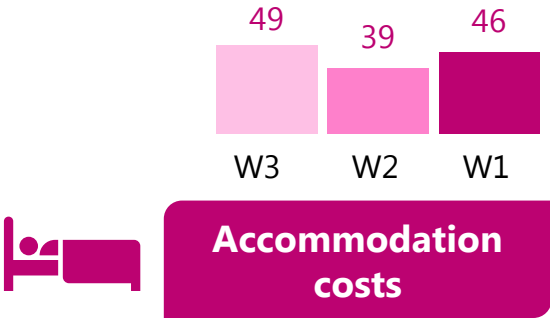
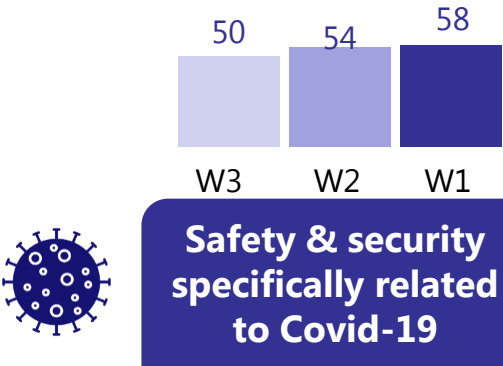


# Travel Considerations & Intent



# While Safety remains a key consideration, cost considerations have seen an uplift – **strong value proposition will resonate strongly**

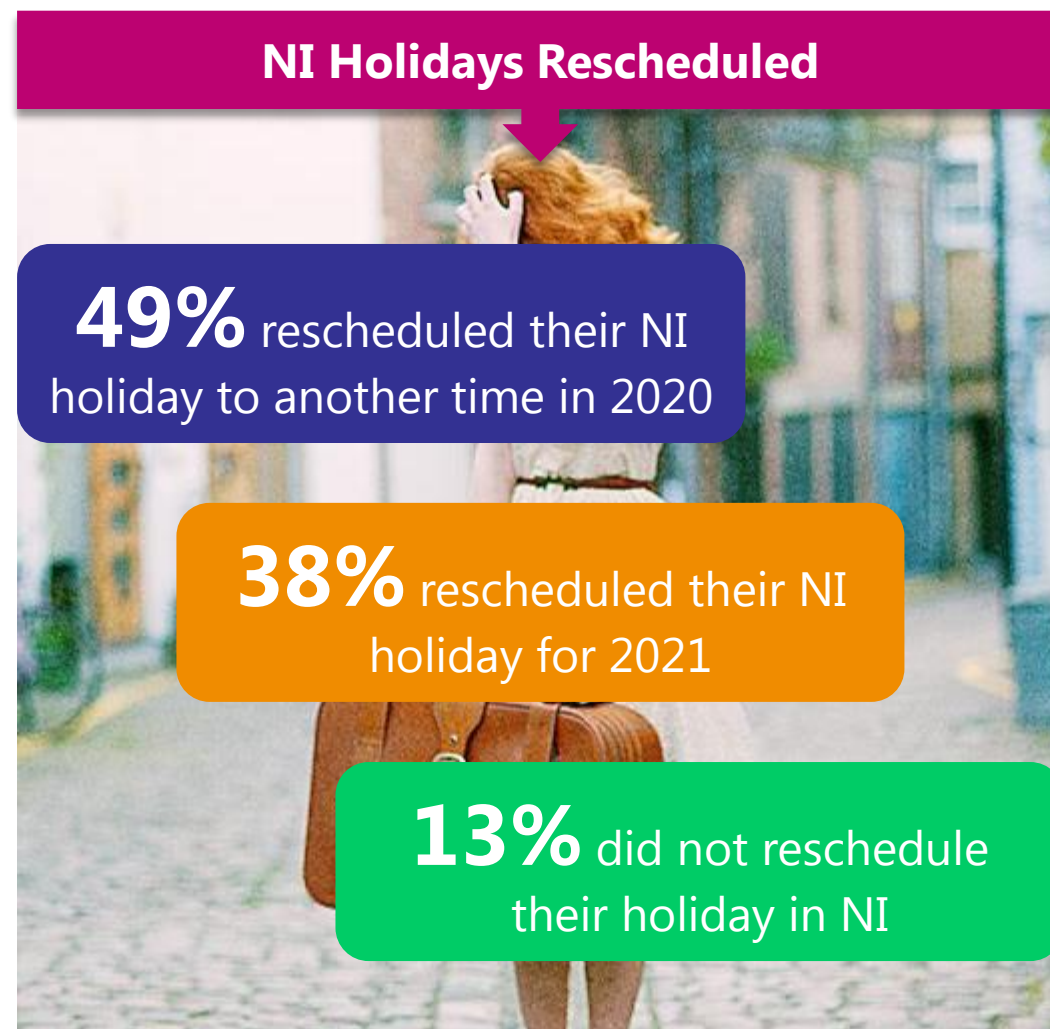
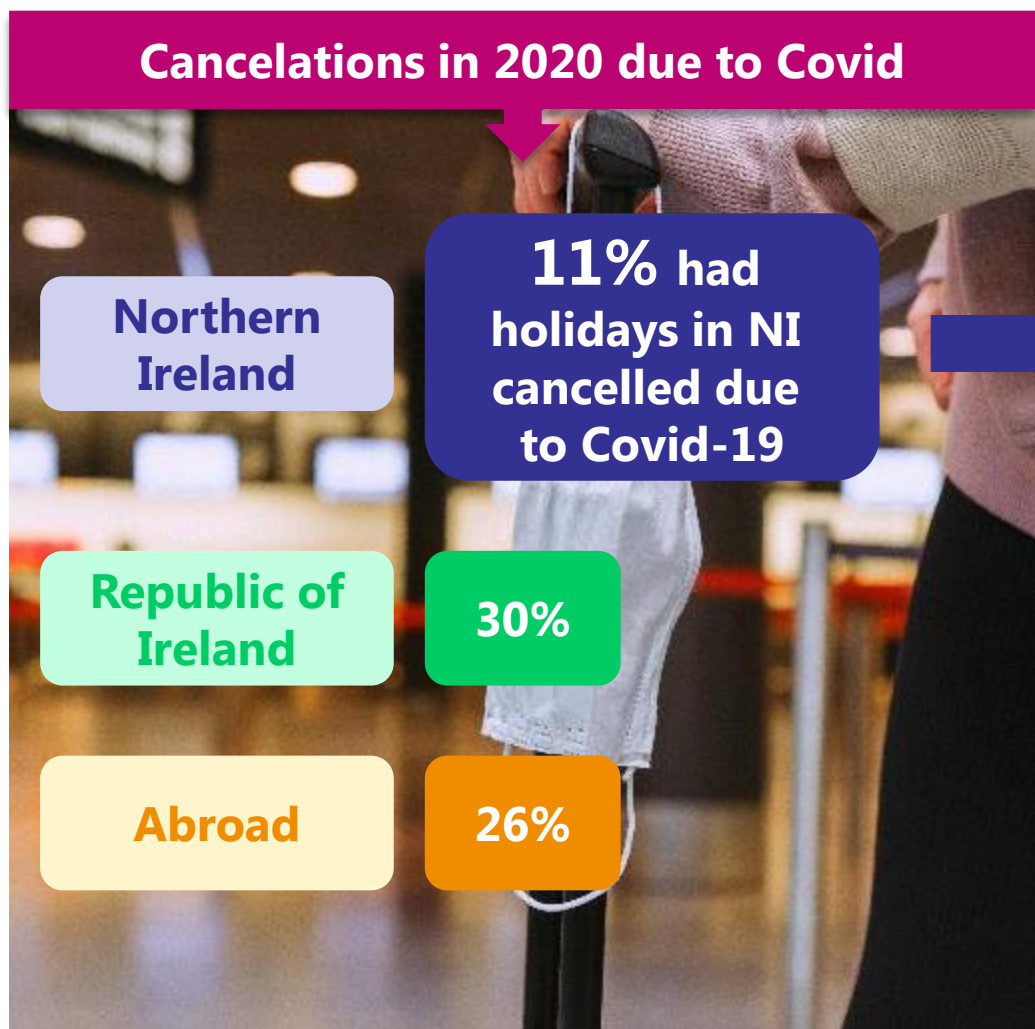
## Short Break in Northern Ireland – Key Considerations



Base = 750

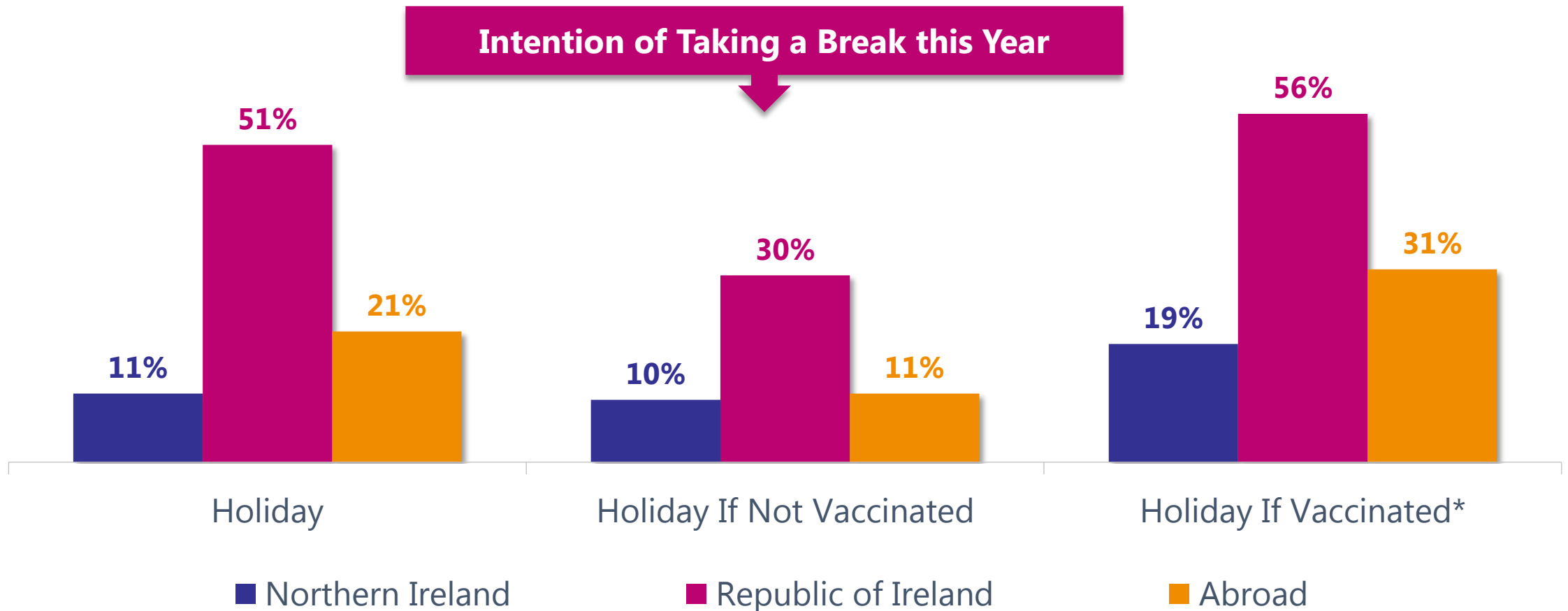
*\*slight change to the wording of the question*

# Good news – only around 1 in 8 did not reschedule NI cancelled holidays. **Still worth pushing to reschedule**



Base = 750 / 84 who had holidays cancelled

# Roll out of vaccines will **result in an uplift in tourism activity**, especially abroad – but many will stay in ROI regardless



Base = 750

Multiple Questions

\*All willing to be vaccinated



# Slight dip in intentions to travel for a short break, with fewer having planned the trip – **need to encourage bookings**

**Note:** Intention Q changed slightly vs previous waves – Intention to travel over the next “6 months” to “this year”



## How much of your short trip have you planned?

N =72



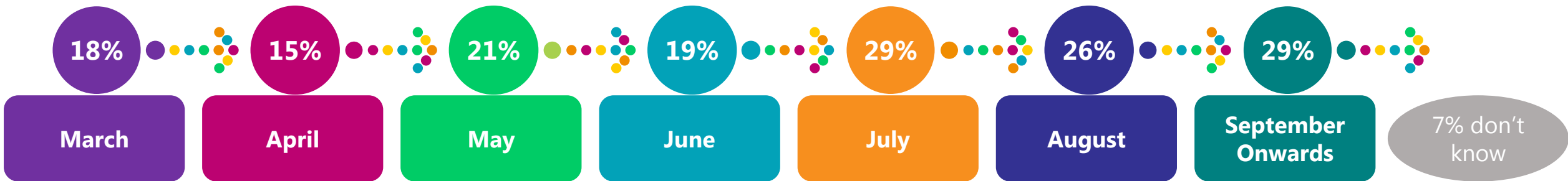
Wave 2 figures: 35% 24% 40%  
Wave 1 figures: 11% 23% 66%

N =750

**10%** intend to take a short break in Northern Ireland  
W2: 13% W1: 13%

N =72

## \*Intention to take a short break to Northern Ireland in:



\*Respondents could be intending on going on more than one trip

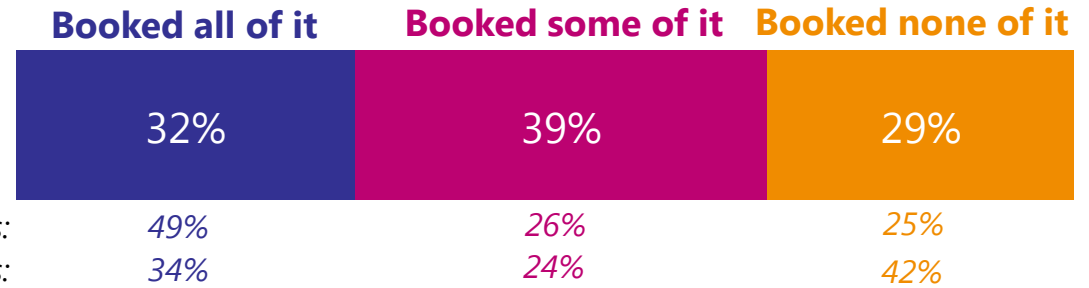
# Long trip intentions also see a dip, with majority of trips likely to take place in **June / July** – need to be ready

**Note:** Intention Q changed slightly vs previous waves – Intention to travel over the next “6 months” to “this year”



## How much of your longer trip have you planned?

N =41 – caution low base size

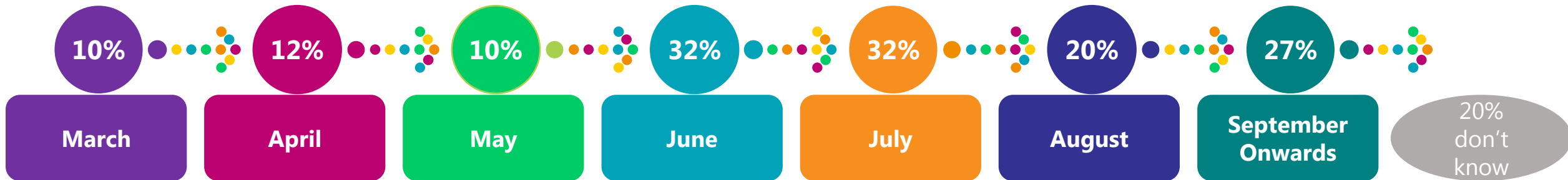


N =750

**5%** intend to take a long break in Northern Ireland  
W2: 9% W1: 6%

## \*Intention to take a longer break to Northern Ireland in:

N =41



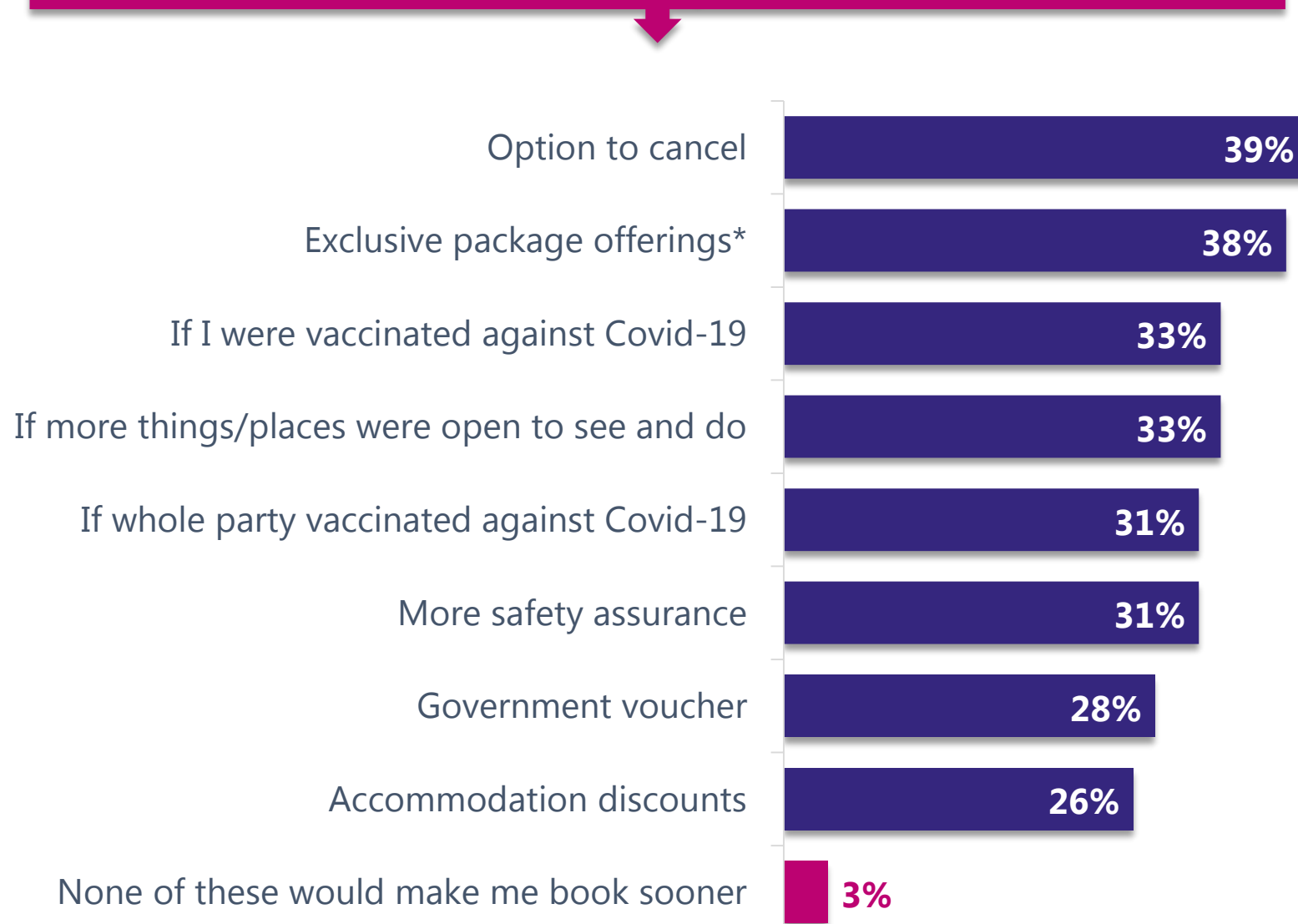
\*Respondents could be intending on going on more than one trip

Mixture of safety and cost factors will encourage holidaymakers to book

**Option to cancel and exclusive offerings will do best**

Base = All who haven't booked all of their break in NI - 61

## What would encourage you to book sooner



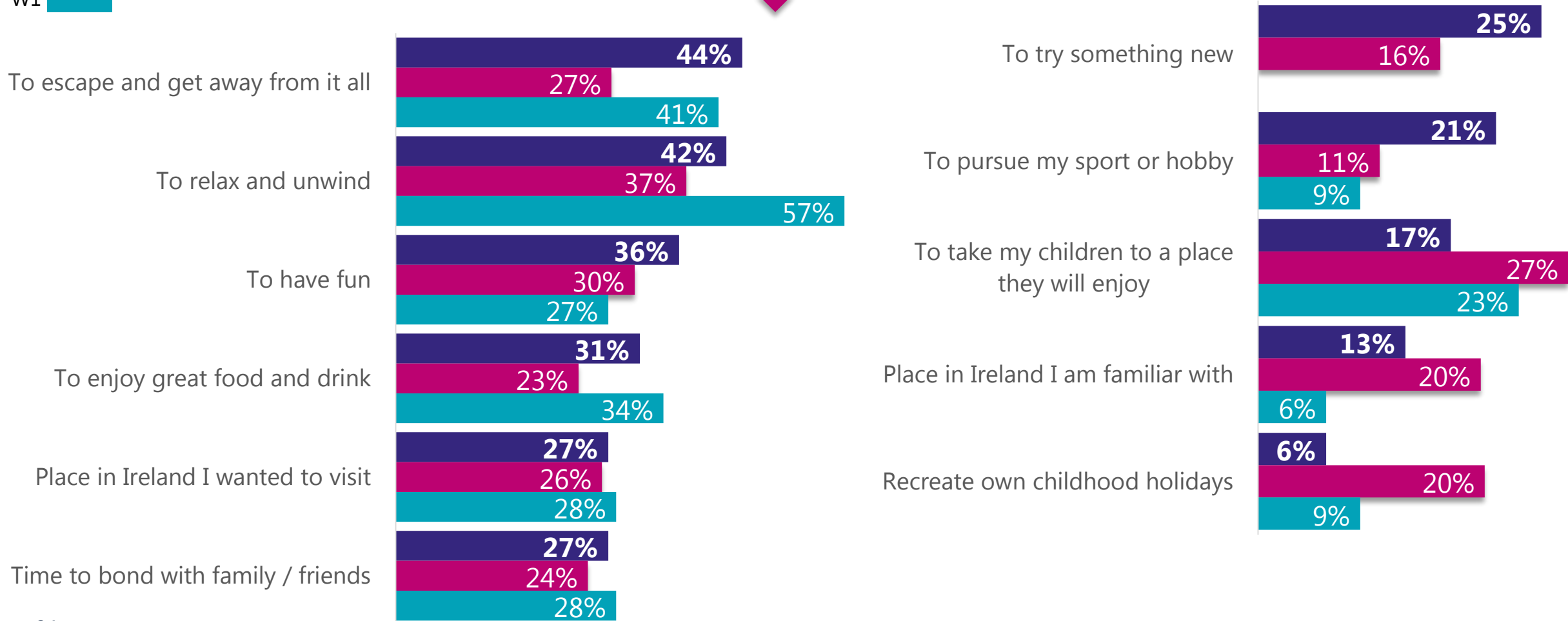
*\*e.g. stay 2 nights and get a free evening meal, free access to certain attractions if staying overnight, stay 3 nights for the price of 2 etc.)*

Q26. Which of the following would encourage you to book sooner?

# Escapism re-emerging as key motivator of travel as fatigue sets in from lockdown 3 – important to include this messaging

W3  
W2  
W1

Motivations for longer / short breaks (combined)



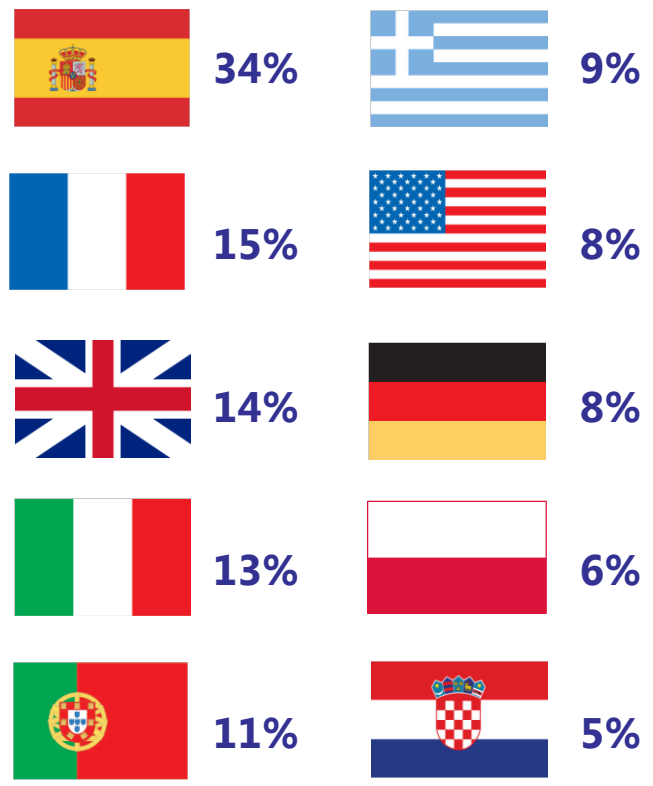
Base = 84

Q27 Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the long/short trip?

# NI not top of list once people are able to travel – majority split into those desperate for a **sun holiday** and those who will stay in ROI

## Destinations of Interest

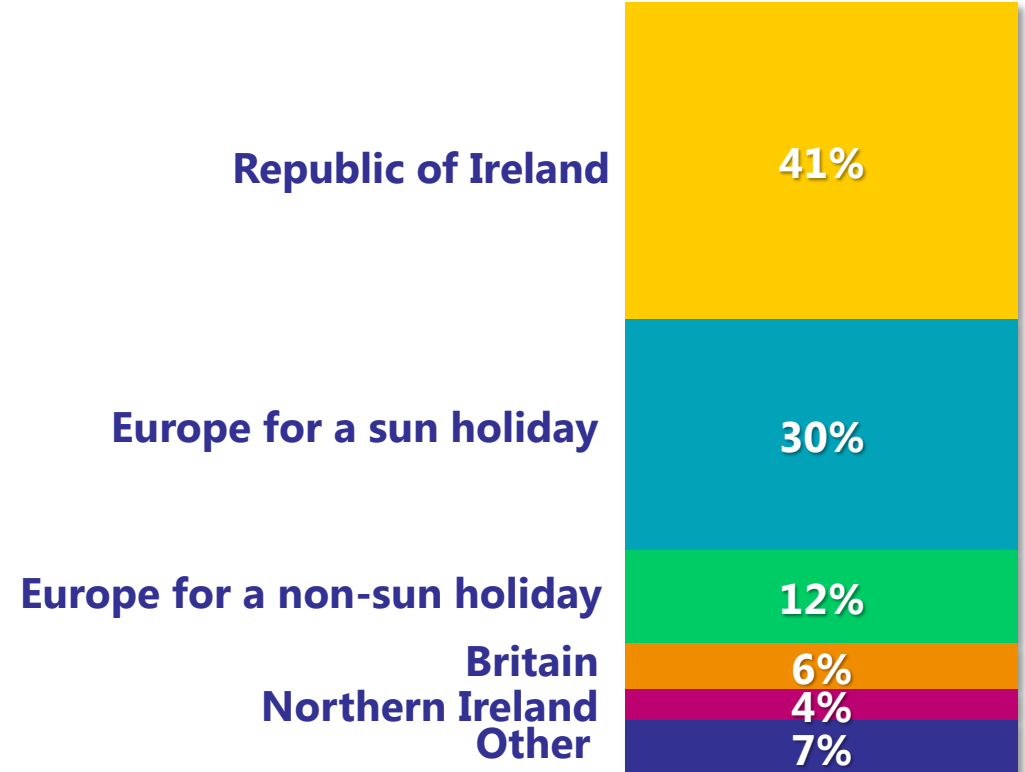
All those planning to go abroad this year - 159



All others 4% or less

## Once travel restrictions ease & vaccine received where are you likely to visit first?

All willing to be vaccinated - 565



## How long after receiving the vaccine will you take this holiday?

All willing to be vaccinated - 565



Base = 750