Consumer Sentiment
NI Market
March 2022 Report

tourism northernireland

SPARK
The Strategic Insight Agency

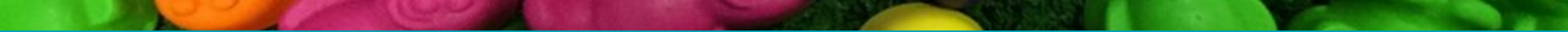
Research background

Research Background & Objectives

This is the **7th wave** of our consumer sentiment research with the Northern Ireland (NI) market. We have continued to look at NI consumer attitudes towards travel in NI and elsewhere, keeping an eye on how perceptions are changing as the Covid situation changes.

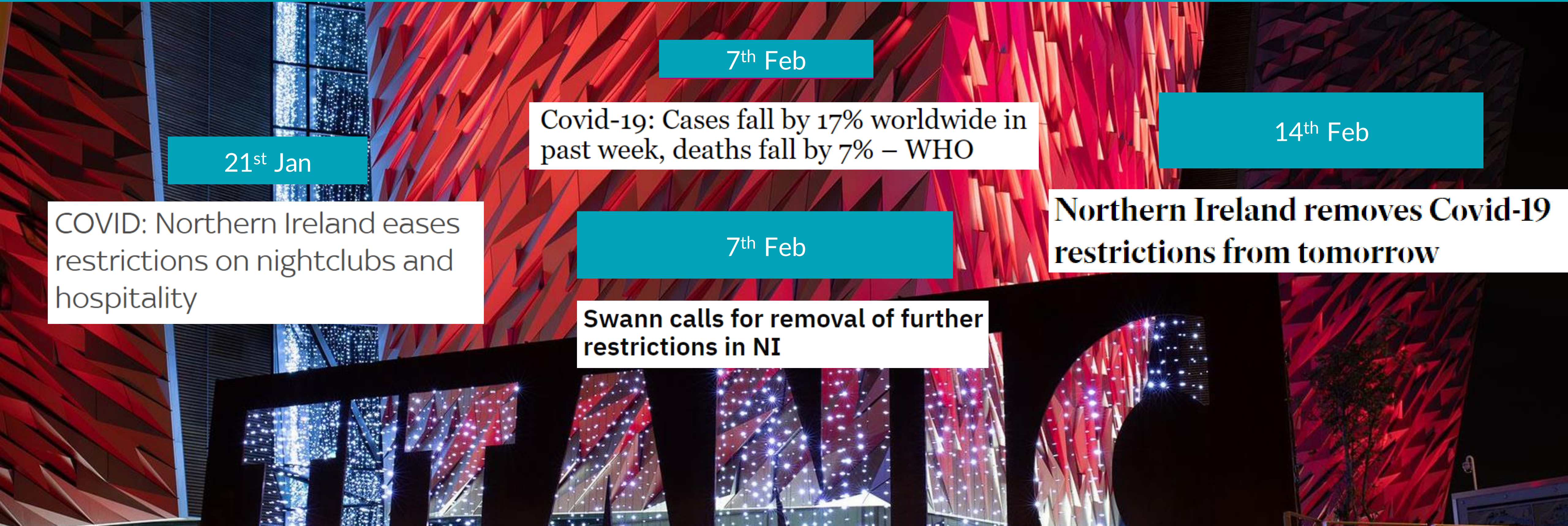
The research objectives:

- 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, Republic of Ireland (ROI) and further afield



What was happening during fieldwork?

FW Dates 4th – 23rd Feb



21st Jan

COVID: Northern Ireland eases restrictions on nightclubs and hospitality

7th Feb

Covid-19: Cases fall by 17% worldwide in past week, deaths fall by 7% – WHO

7th Feb

Swann calls for removal of further restrictions in NI

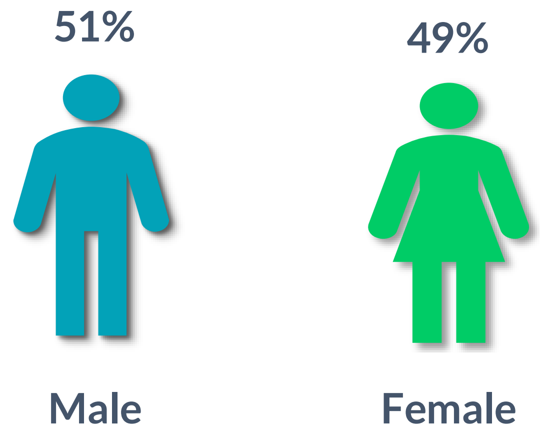
14th Feb

Northern Ireland removes Covid-19 restrictions from tomorrow

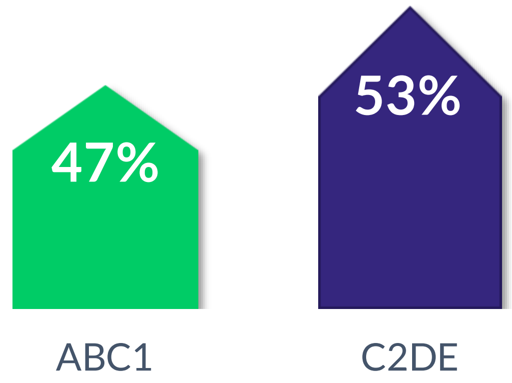
We interviewed a robust, nationally representative sample in Northern Ireland

Total sample = 450

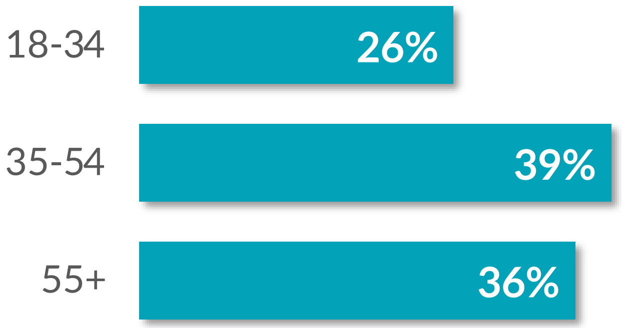
Gender



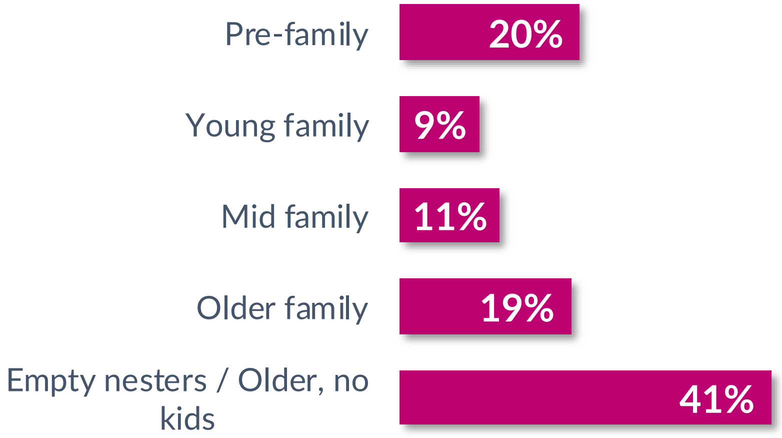
Social Grade



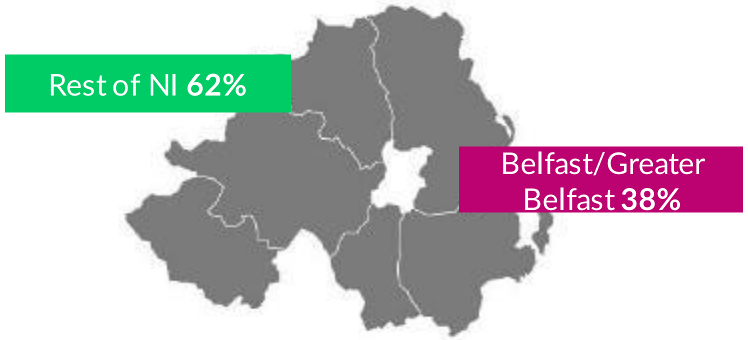
Age



Life stage



Region



Base n = 450

Key Takeaways

Strong sense of hope and things improving

- 86% think things will stay the same or improve in the coming month
- Number of people reporting being stressed or anxious drops to 33%
- Significant growth in terms of safety perceptions for travel and sense that holidays won't be cancelled – in short, things have moved quickly in the right direction since November

But NI is still a few steps behind ROI in terms of mindset

- When comparing figures to ROI, the growth has not quite been as sharp for NI residents
- In NI, there are more lingering nerves about indoor events

NI perceptions are strong but travel intentions stable

- For those considering a break in NI, quality and choice emerged as the two strongest selling points
- We didn't see a significant growth in terms of travel intentions for NI, with the exception of long breaks this summer
- It may take a little longer to see the positive effect of reduced nervousness around Covid

Travel abroad still a step too far for some – ROI key competitor this summer

- There is a growth in consideration of travel abroad, but still below trip intentions for NI and, notably, ROI, with 23% considering long breaks in ROI this summer
- Priorities are likely to change in the coming months but for now most will keep trips to Island of Ireland – losing as few 'staycationers' to ROI trips as possible should be a priority

Covid-19 and tourism

The outlook is very good: 86% now think things will **get better or stay the same** from here

How is the Covid situation going to change in the coming month?

More negative outlook among **mid family** (32%)

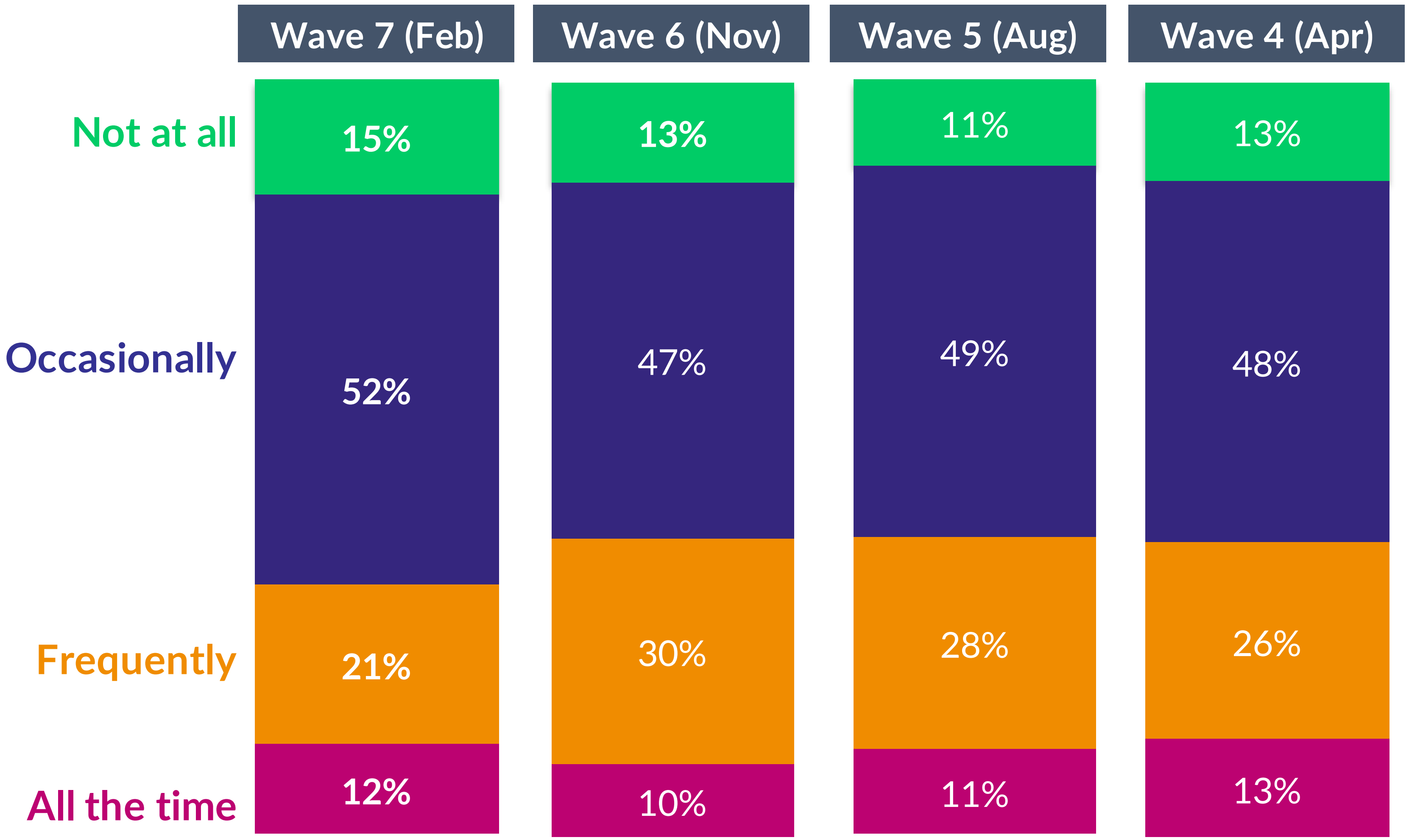
More positive outlook among **over-55s** (54%), **pre-family** (58%)

Base n = 450

A1a. Regarding the situation of Coronavirus/Covid-19 in Northern Ireland and the way it is going to change in the coming month, which of the following best describes your opinion?

This corresponds to a dip in the number saying they’ve been **stressed/ anxious** – still 1 in 3, but down 7%

Stress / anxiety levels during Covid



Most likely to report being anxious frequently/ all the time:

- **Mid family** 45%
- **Older, no kids** 46%
- **ABC1** 38%

Base n= 450

A1b. How would you describe your stress and anxiety levels during Covid-19?

Market Comparison
Covid-19 & Tourism

ROI now more optimistic about Covid than those in NI

57% in ROI think the 'worst has passed' – in NI, this figure is **49%**

However, levels of stress decrease further in NI than ROI

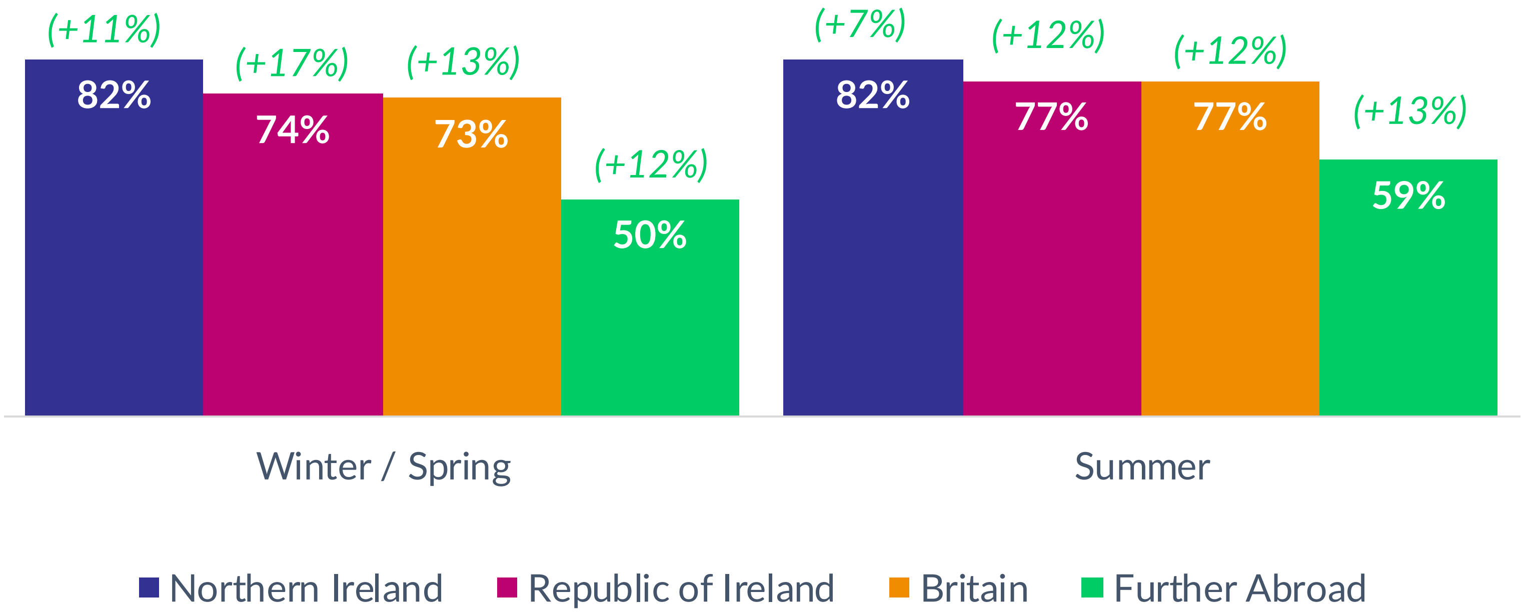
39% feeling anxious 'frequently/ all the time' in ROI and **33%** in NI – NI drops vs. November whereas ROI rises slightly

Current attitudes towards travel

Safety perceptions are up across markets – 4 in 5 now feel a holiday in NI would be safe

Lower number feel trips abroad are safe

How safe would it be to go on holiday in… *(scores vs. Nov)*



Base n= 450

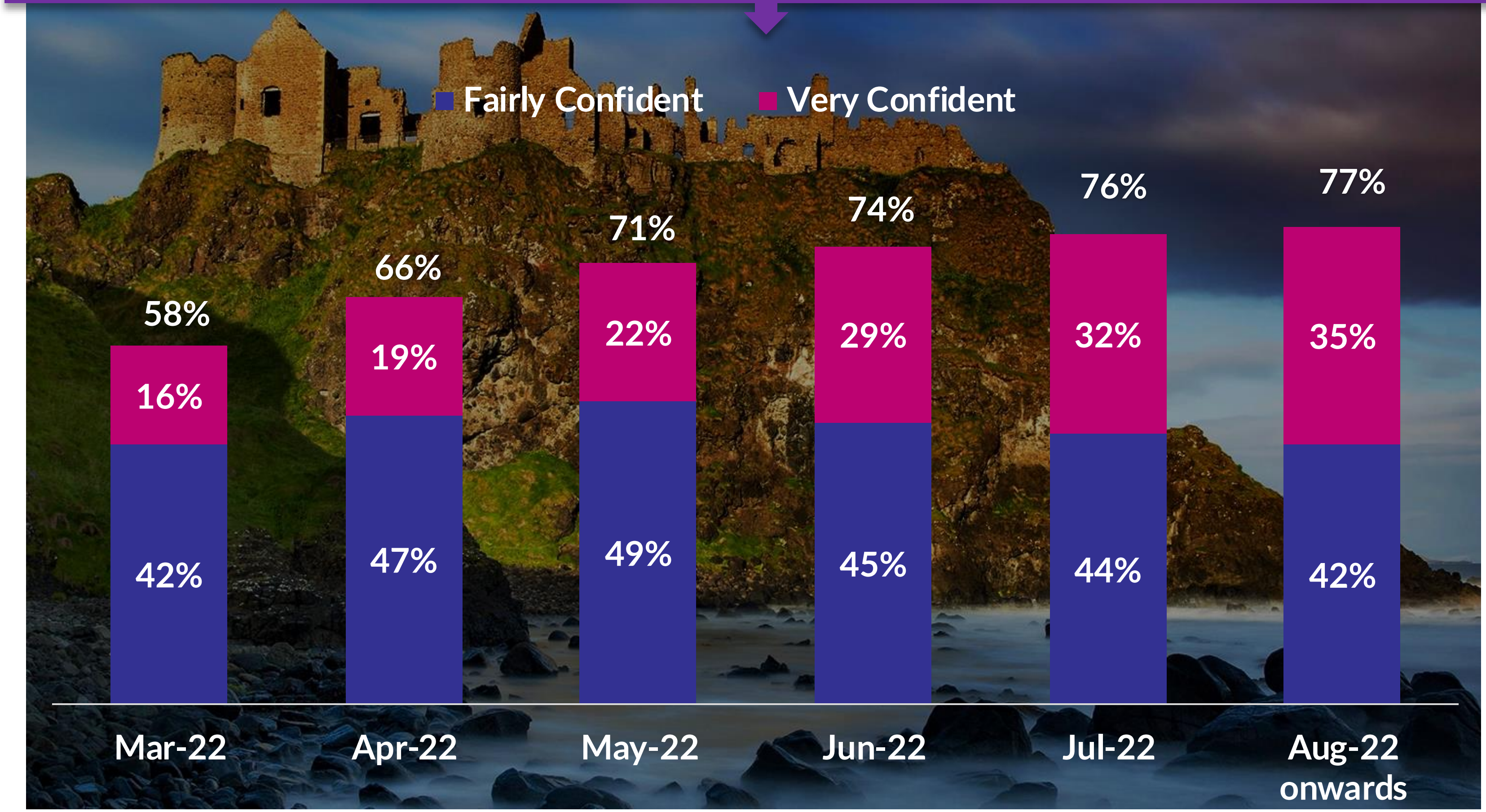
B1. How safe do you think it would be to take a holiday or short break in each of the following locations this winter / spring? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations during the summer? 'Safety' specifically refers to the risk of contracting Covid-19.

Confidence that holidays **won't be cancelled** has also grown – and rises to 3 in 4 by summer

58%
would be confident in a holiday on the Island of Ireland this month

W5 (August): **51%**
W6 (Nov): **36%**

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

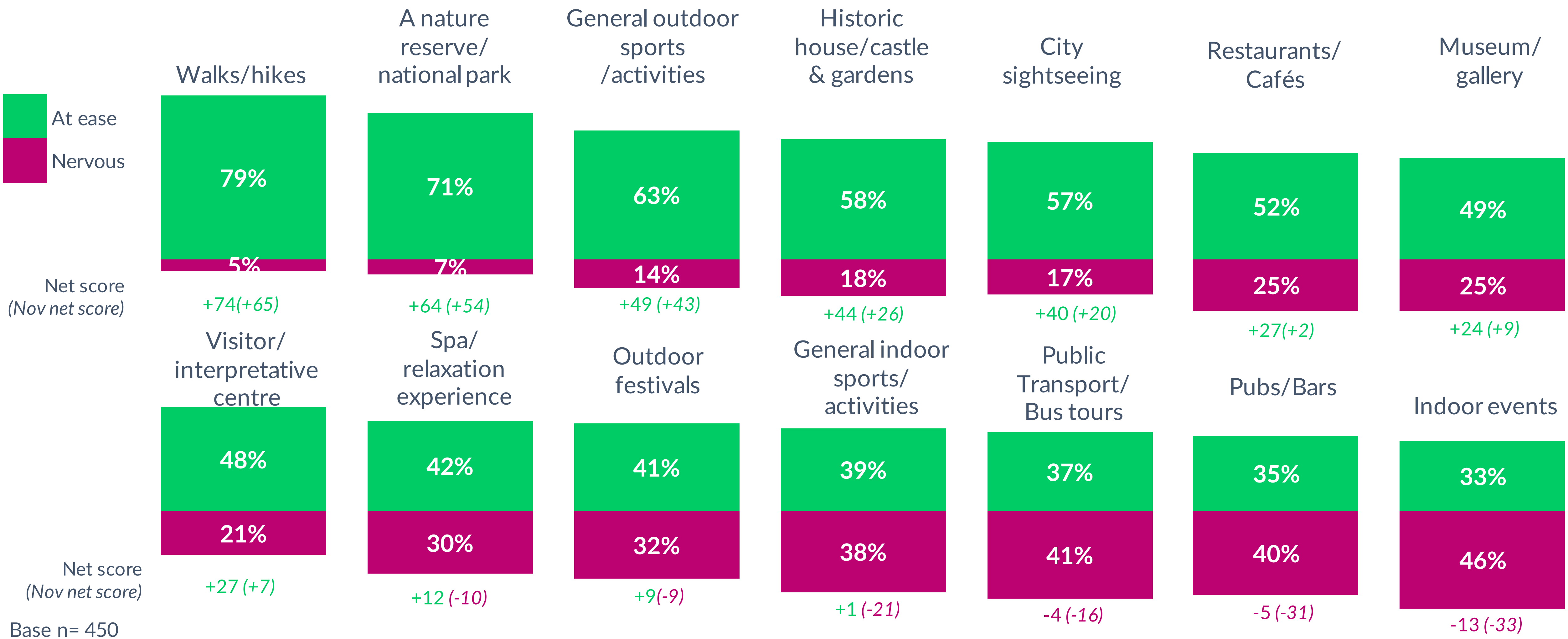


Base n= 450

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)?

Sense of ease grows with all activities

Ease in engaging with activities this winter/ spring

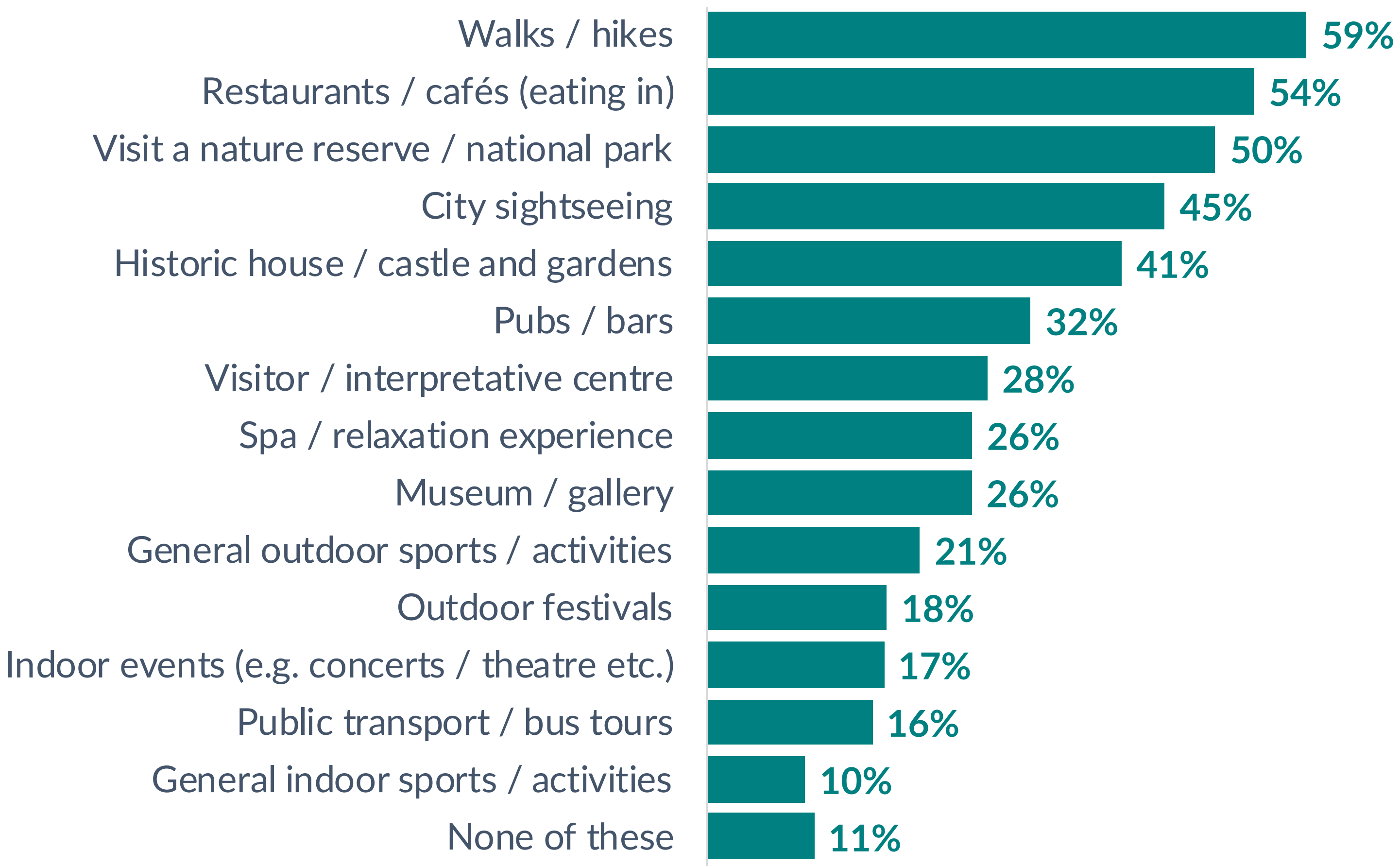


Base n= 450

B4. How do you currently feel about engaging in these activities this winter / spring?

Restaurants are now **a key feature** for planned trips to NI – up there with walks/ hikes

What they'd be interested in if taking a trip in NI



Similar hierarchy for those considering or taking trips in NI – although restaurants is #1 interest (69%) ahead of walks and hikes (66%)

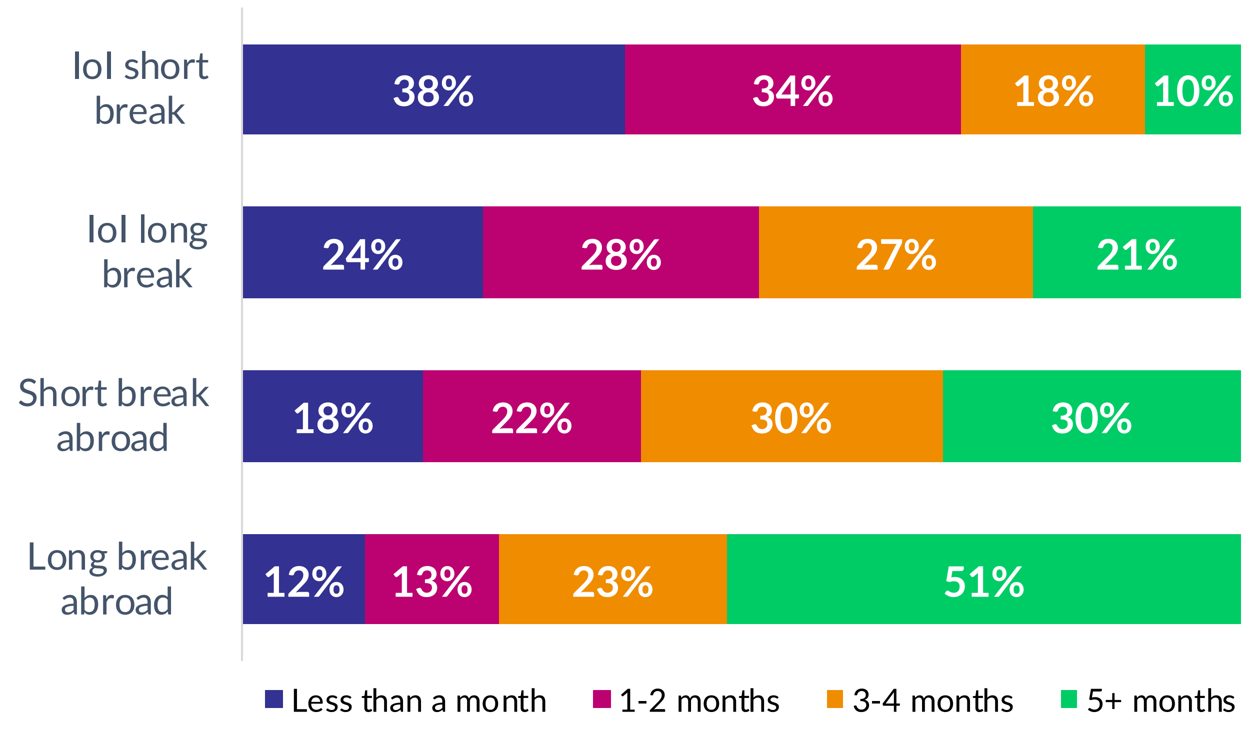
Young families are more interested in **pubs** (51%) and **restaurants** (63%)

Older families are more interested in **walks / hikes** (67%) and **nature reserves** (64%)

Base n = 450

B5New. If you were to go on a trip in Northern Ireland today, which of the following activities would you consider doing?

When they'd book (if they were booking a holiday now). *Excl N/A*



Around half of long breaks on the Island of Ireland are booked within 2 months of the date of travel – whereas half of long breaks abroad are booked 5 months+ in advance

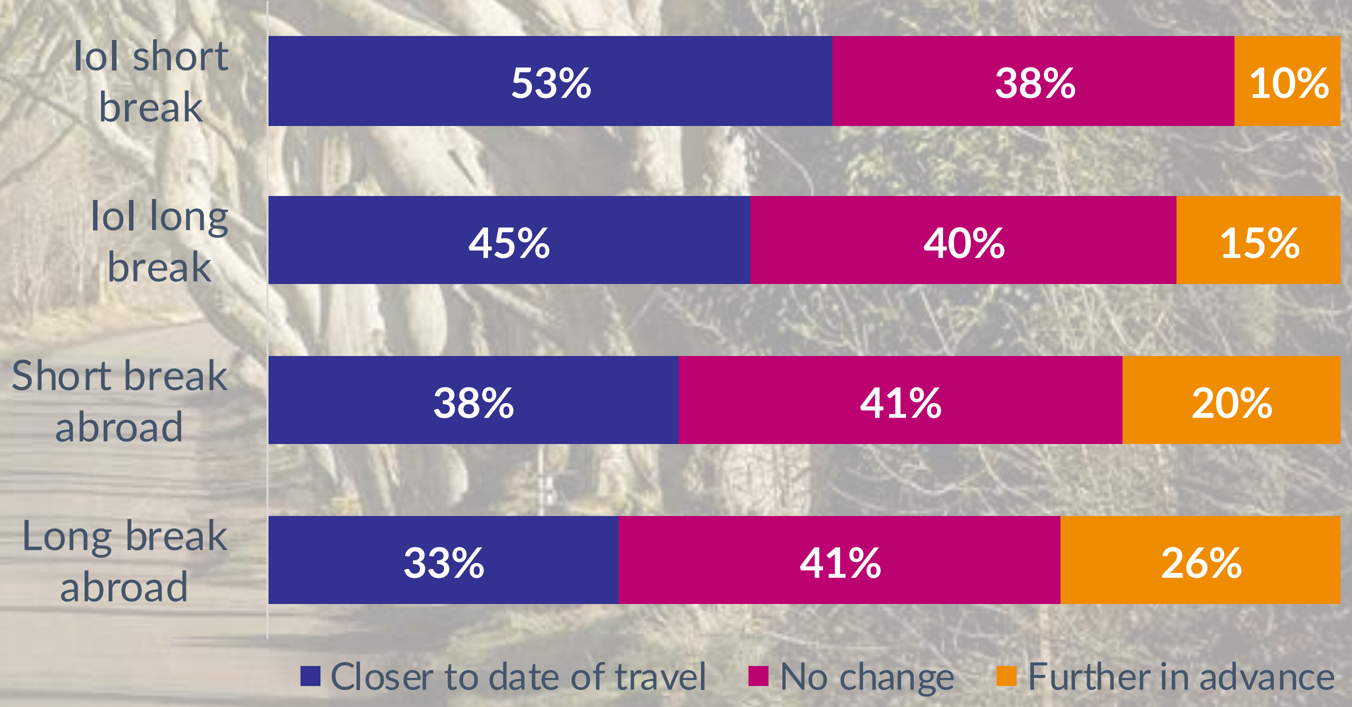
NI residents tend to book further in advance than those in ROI for both Island of Ireland holidays and trips abroad

Base n = 450

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 winter / spring 2022 (i.e. February – May)?

All types of trip are being booked **closer to the date of travel** with continued nervousness around cancellations – especially short breaks on the Island of Ireland

Are you booking holidays closer to date of travel or further in advance for the following?

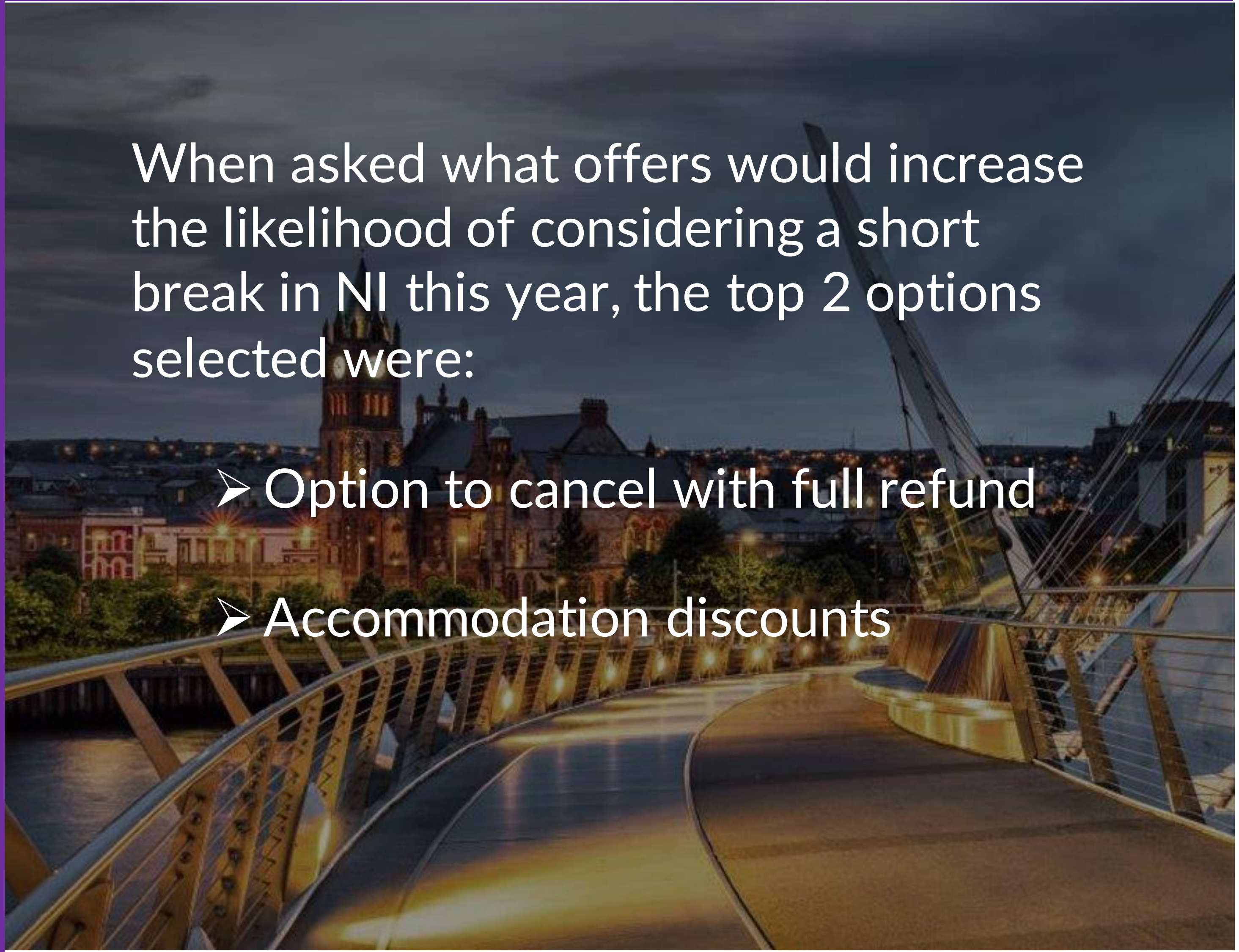


Base n = 450

We'd now like you to think about the answers you just gave. Thinking about the booking process for holidays or short breaks, would you say you are booking holidays further in advance or closer to the date of travel than before Covid (i.e. pre-2020) for each of the following?

With some nervousness remaining around cancellations, **refunds** are still the key offer

Which offers would increase consideration of NI



When asked what offers would increase the likelihood of considering a short break in NI this year, the top 2 options selected were:

- Option to cancel with full refund
- Accommodation discounts

Base n = 450

B7. Which, if any, of the following would make you more likely to consider a short break in Northern Ireland this year?

Market Comparison

Current Attitudes towards Travel

Those in ROI have a stronger perception of safety in their home market and elsewhere

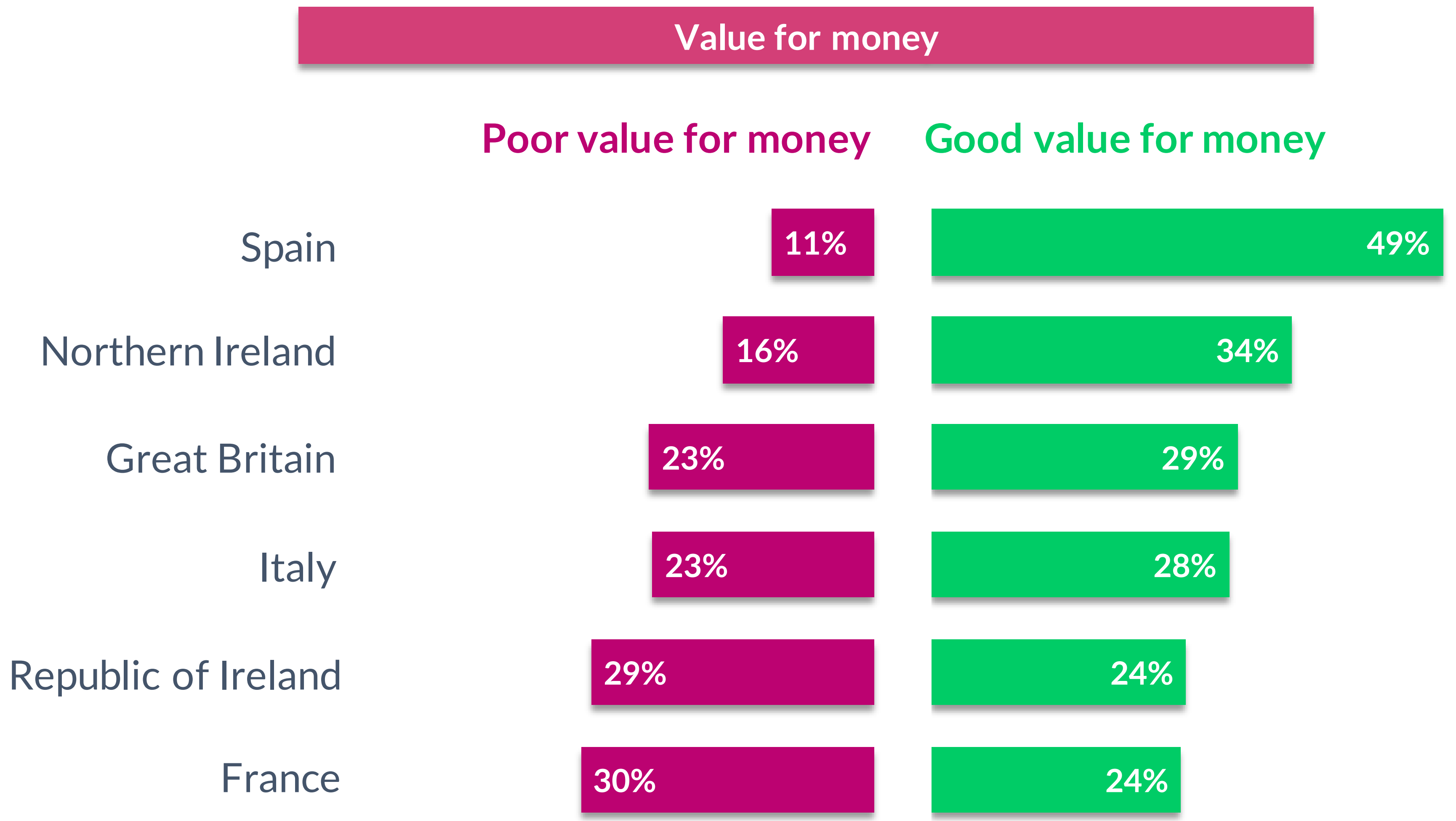
ROI residents' perception of ROI safety at **89%**, NI **73%**, abroad **66%**; respective scores for NI residents sit at **74%, 82%, 50%** - all significantly lower

Travel confidence is also higher among those in ROI, including going into summer

64% of ROI residents would be confident a holiday wouldn't be cancelled, rising to **85%** in July; for NI residents, **58%** are confident now and this rises to **77%**

Value for money (VFM)

NI VFM perception drops slightly, although it is still well ahead of key competitors



Net Score

	Feb	Nov	Aug
Spain	+38	+40	+38
Northern Ireland	+19	+29	+30
Great Britain	+6	+8	+7
Italy	+6	-6	+11
Republic of Ireland	-5	-19	0
France	-6	-11	0

N = 450

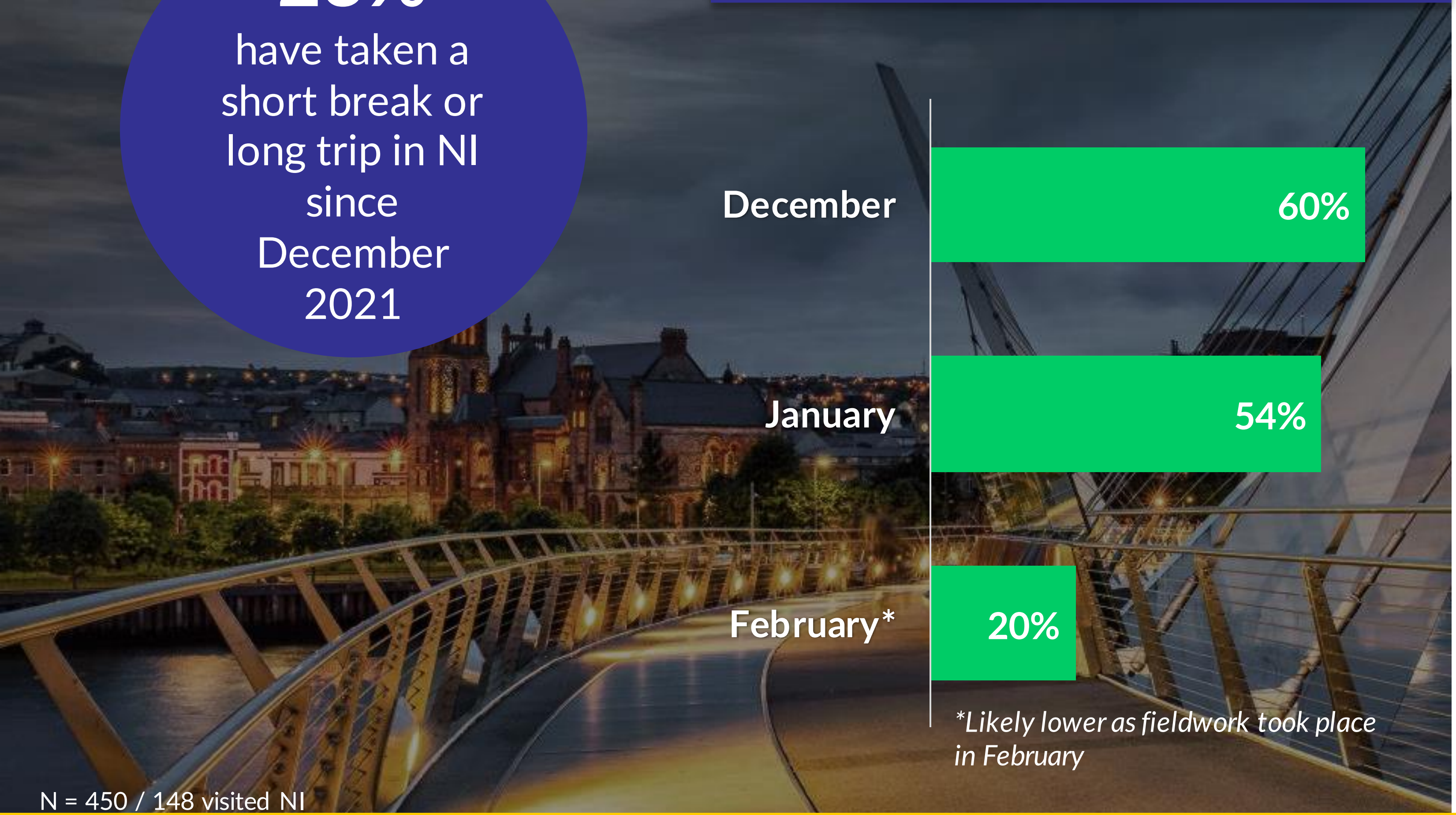
C1. When thinking of the following places as tourism destinations, to what extent do they offer value for money?

Travel experiences of NI

One in four took a break in NI over the winter period

23% have taken a short break or long trip in NI since December 2021

Holidays taken in...



N = 450 / 148 visited NI

Other than NI...

20% took a break in ROI

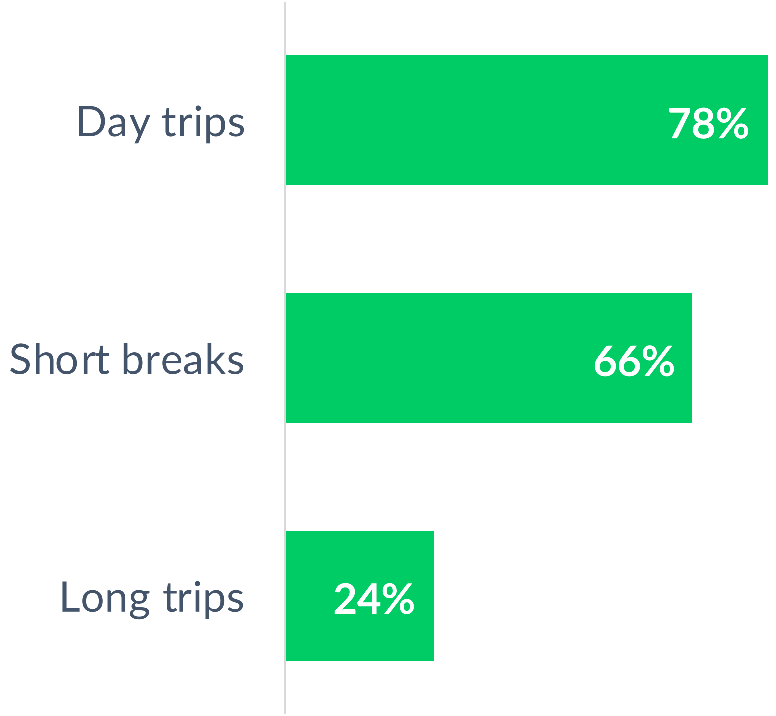
11% went abroad

57% didn't travel at all *(down 3% vs. November wave)*

D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes in 2021? / D3. And when did you take your holiday(s) or short break(s) in Northern Ireland in 2021? / D4. Was this your first time taking a holiday or short break in Northern Ireland for leisure purposes?

High number of those taking trips combined day trips and short breaks

% of trips taken to NI which were…

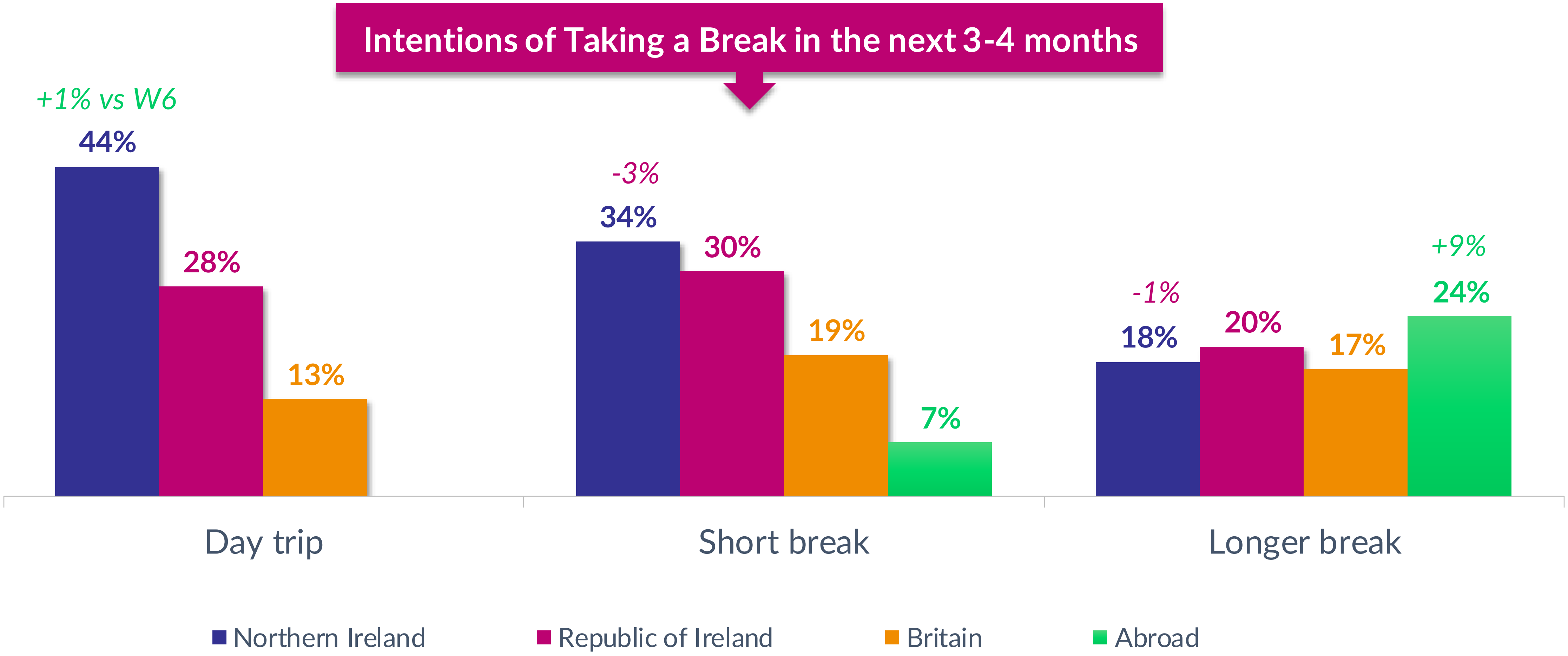


N = 750 / 168 visited NI (caution low base size)

D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes in 2021?

Travel intent

NI travel intentions are stable compared to the previous wave



Base = 450

Multiple Questions

Figures for travel intentions are very solid albeit there is little change vs. November

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

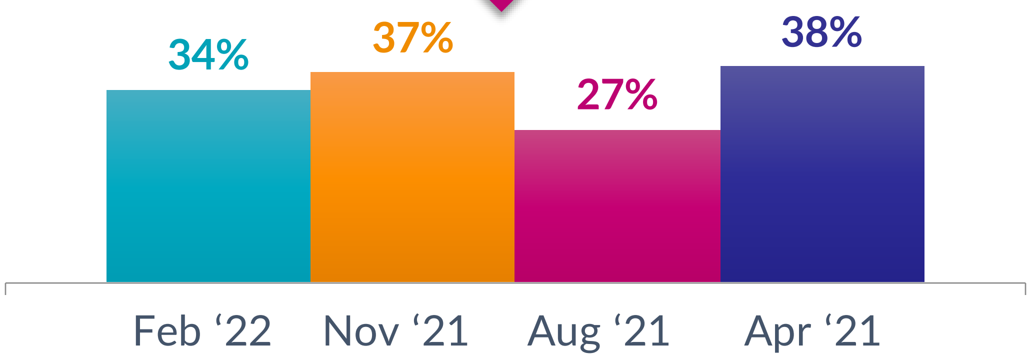
44% Leisure day trip

34% Short break

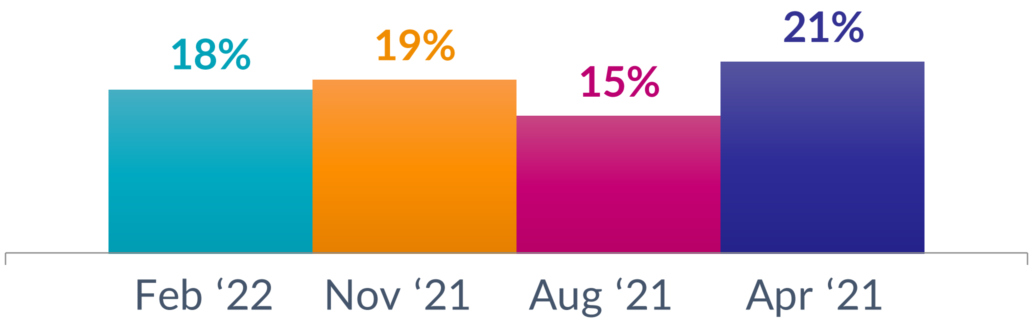
18% Long break

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



Young families most likely to be express intent to take a short break in Northern Ireland in the next 3-4 months (49%). They prize fuss-free booking; 40% want to get the booking process out of the way as quickly as possible

Base (n) = 450

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?

Most are planning to start looking at day trips later – March and April likely key months for these

N =450

44% considering taking a day trip in Northern Ireland
W6: 43%

How much of your day trip have you planned?

N =160

I have booked	Actively planning	Intend to start planning later	May or may not plan
13%	23%	36%	28%

Those who agonise over booking breaks are most likely to express a future intent to start planning; 47% vs 29% of those who love the process

N =198

*Consideration of day trips to Northern Ireland in:

February	March	April	May
13%	32%	40%	28%

14% 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?

Expect higher short break volumes in late spring

N =450

34% considering taking a short break in Northern Ireland

W6: 37% W5: 27% W4: 38% W3: 29% W2: 21% W1: 25%

How much of your short trip have you planned?

N =133

I have booked	Actively planning	Intend to start planning later	May or may not plan
12%	26%	33%	29%

+7% (May or may not plan)

N =155

***Consideration of short breaks to Northern Ireland in:**

February	March	April	May
10%	23%	33%	33%

24% 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?

Expect long breaks in May especially. Shorter lead-in period for booking continues with only 15% having booked so far

N =450

18% considering a long break in Northern Ireland

W6: 19% W5: 15% W4: 21% W3: 12% W2: 9% W1: 12%

How much of your longer trip have you planned?

N = 83 – caution low base size

I have booked	Actively planning	Intend to start planning later	May or may not plan
15%	30%	33%	22%

N = 83

*Consideration of longer breaks to Northern Ireland in:

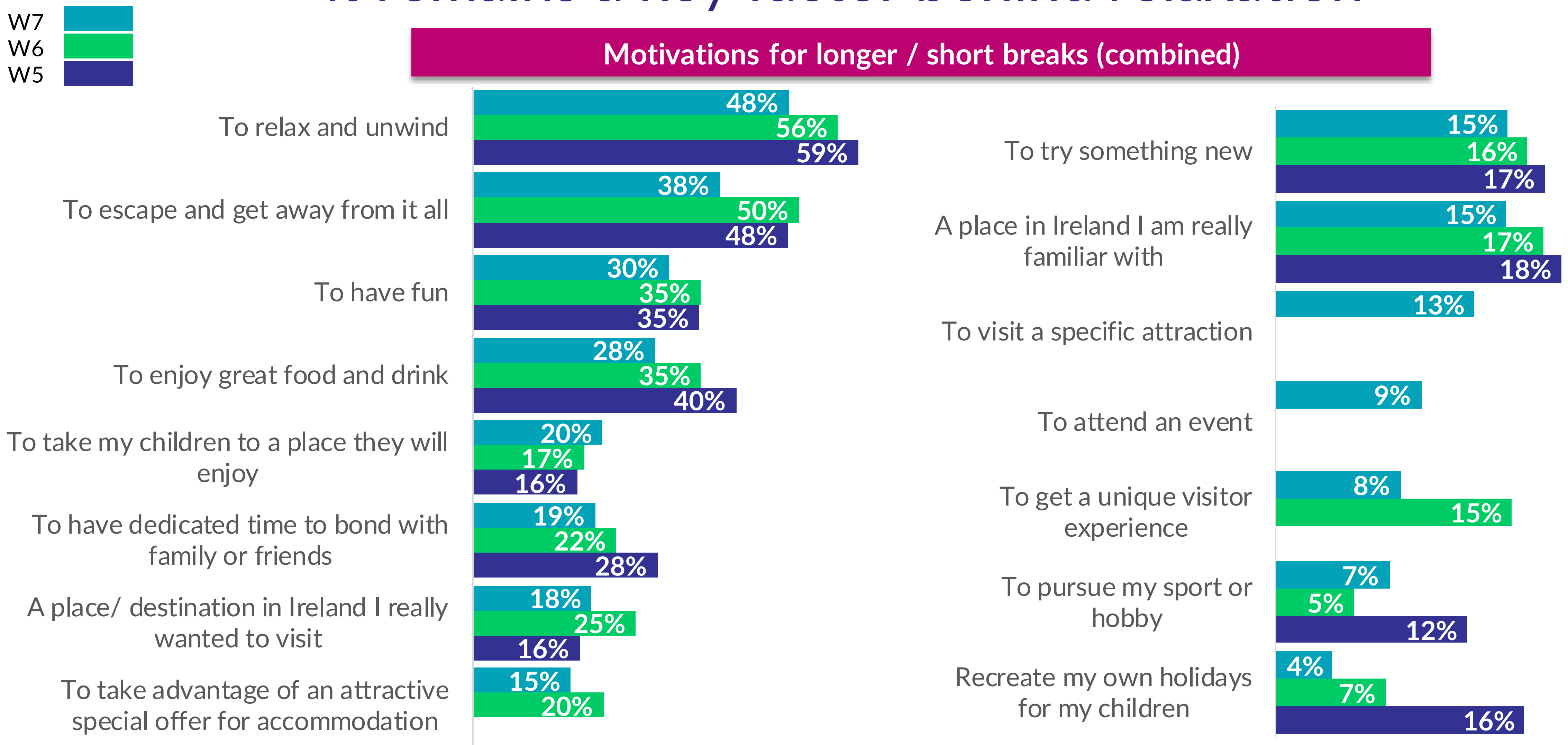
February	March	April	May
7%	16%	29%	39%

29% 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?

Escapism drops somewhat as a motivation for a break although it remains a key factor behind relaxation

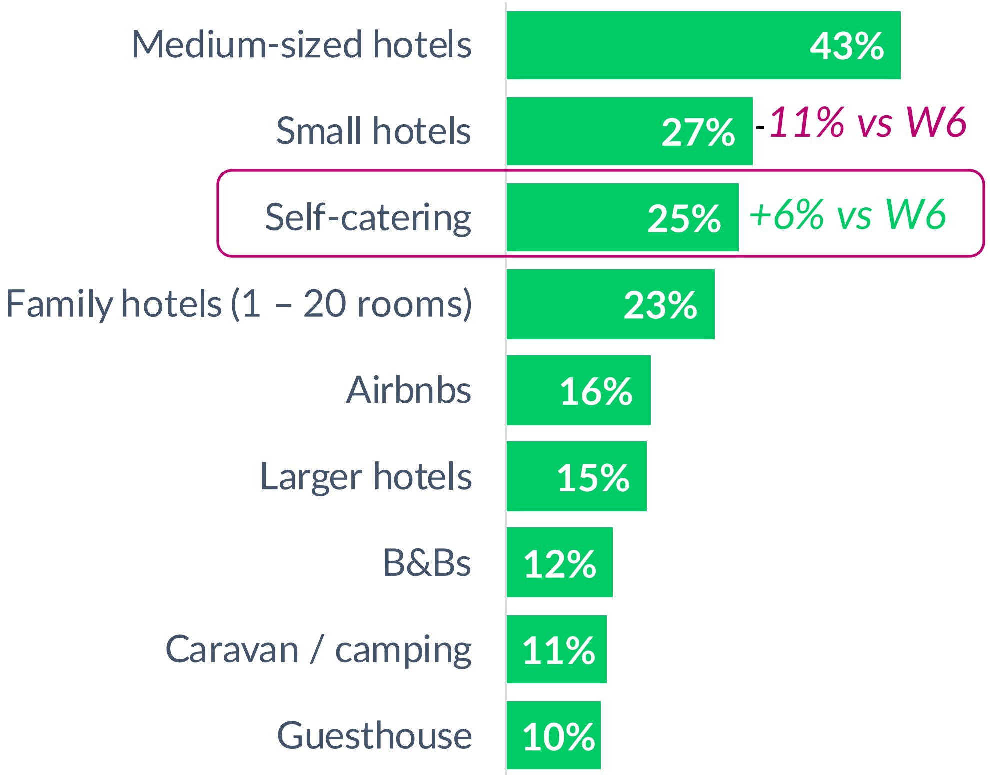


Base = 176

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

There is a continued preference for laid back holidays. Preference for self-catering increases from Wave 6

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



Self-catering sees a jump from 19% in W6

Who travelling with (long & short combined)

- 48% Partner / spouse
- 40% Immediate family
- 24% Friends

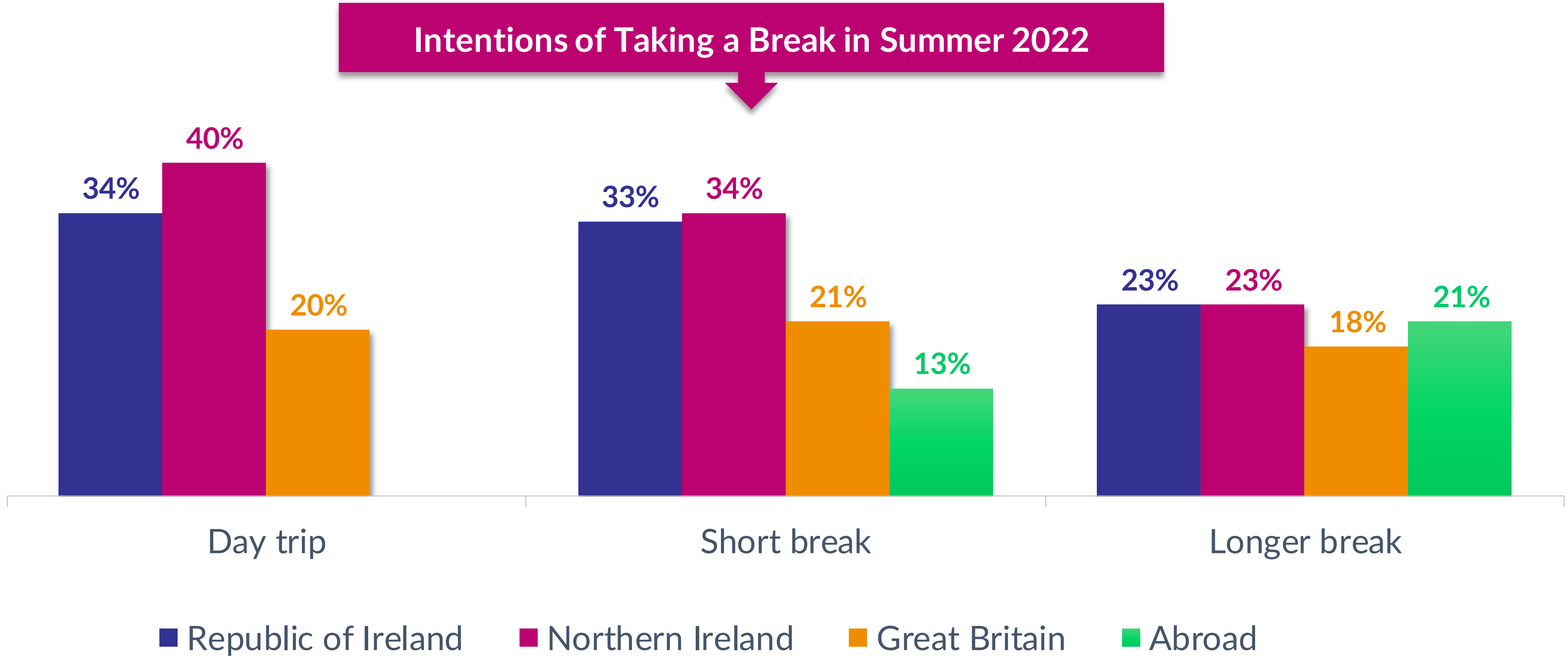
Type of trip preferred

- 59% Laid back holiday
- 11% Exciting holiday
- 30% A bit of both

Base =176

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...

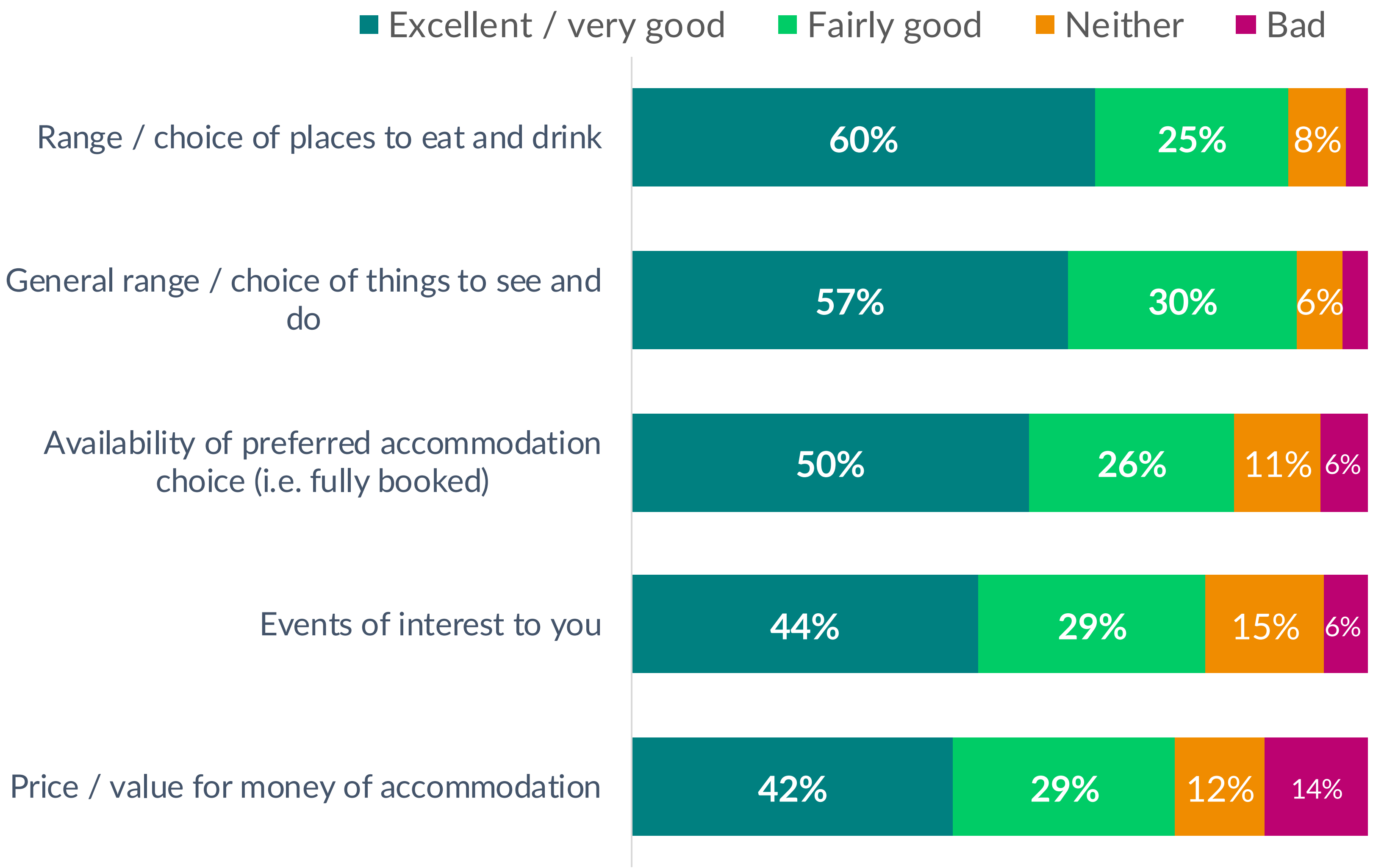
There is a good increase for long break intentions in NI this summer, to 23%. Uplift too for ROI short/ long breaks, much more so than trips abroad – ROI remains the main competitor for all trips at this stage



Base = 450

Multiple Questions

How they would rate the following based on research



High scores across the board for key aspects of NI trips – with **quality** and **choice** the two strongest selling points

Base = 157 researched trip to NI

D8b. Thinking about the research you have done for your possible trip(s) to Northern Ireland, how would you rate the following aspects?

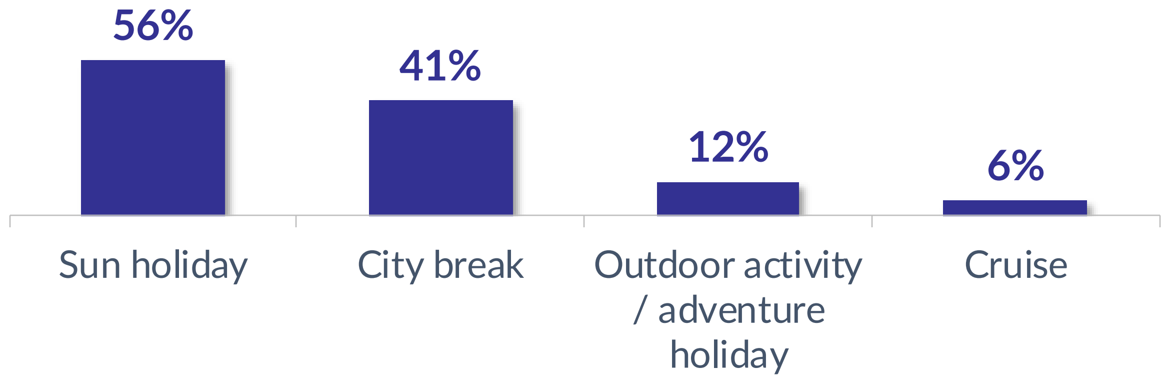
Number considering trips abroad grows by 10 percentage points, with pent up demand being the key reason

25% of total sample are considering a break abroad in the next 3-4 months

54% of this cohort are actively planning or have booked their trips

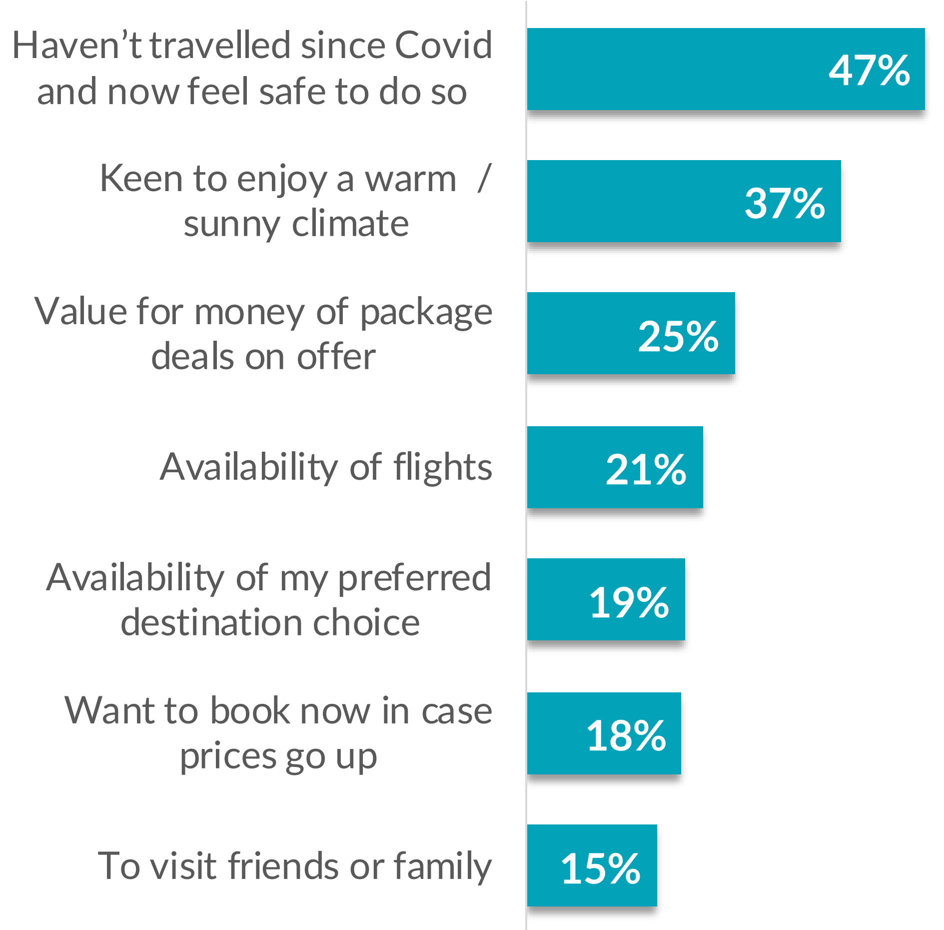
This is up significantly vs. wave 6 in November, from **15%** - and is higher with 18-34s and pre-family lifestages (including Social Instagrammers)

What type of trip are you considering?



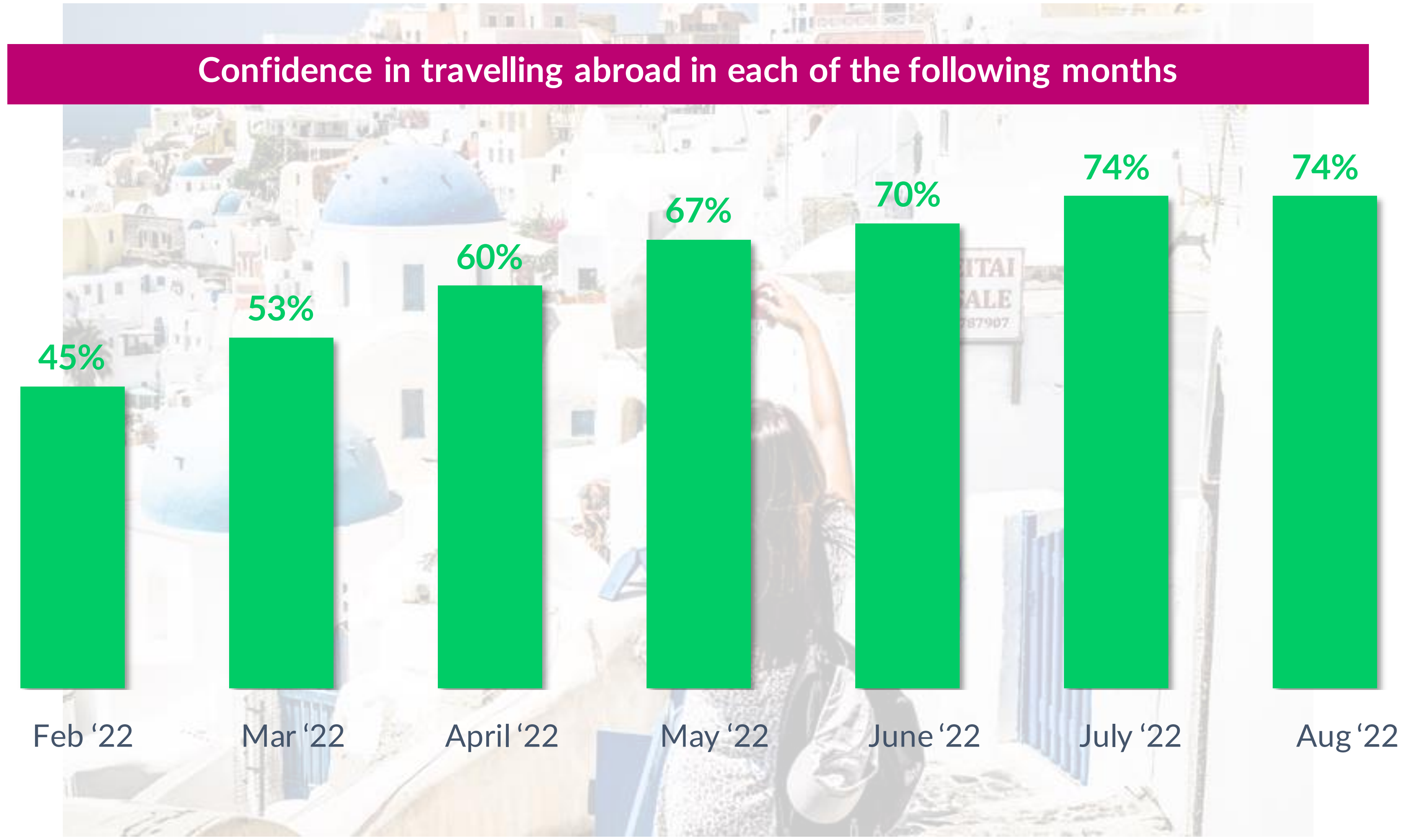
Base = 247 considering trip abroad

Reason to consider a trip abroad this winter/spring



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

Most expect summer trips **will not be cancelled** –market for holidays abroad will likely grow in coming months



No significant age split in terms of confidence – but those with kids are more likely to be confident they could travel in March (**60%**)

Base = 450 total sample

E15cNew. 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)?

We’re Good to Go

While awareness of ‘We're Good to Go’ has dipped slightly since August, the confidence that it instils has remained stable since the last wave.

Base n = 450

E10. Are you aware of the ‘We’re Good to Go’ mark? / E11. To what extent does the ‘We’re Good to Go’ mark give you confidence that a tourism or hospitality business is safe to visit?

Market Comparison

Travel Intent

Higher confidence in ROI means travel intentions grow more than in NI

NI short break intent up **6%** in ROI; in NI this drops slightly by **3%**

'Relax and unwind' remains top trip motivation in both markets

Travel abroad also less of a pull for those in NI – for now

Long break intentions for trips abroad are **31%** and **36%** for spring and summer respectively. Compare this to **24%** and **21%** for NI. However, confidence is growing significantly in both markets

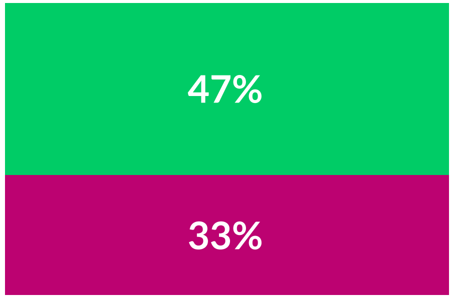
Events

Perception of Safety this Spring - Outdoor Event

Safe
Unsafe

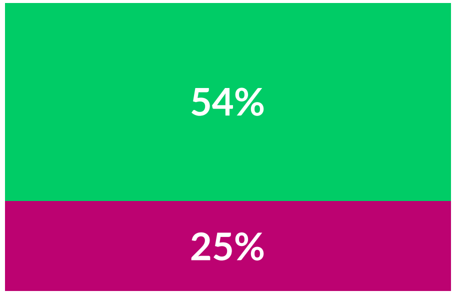
Large Outdoor Event

(+2% vs Nov)



Small Outdoor Event

(+2%)

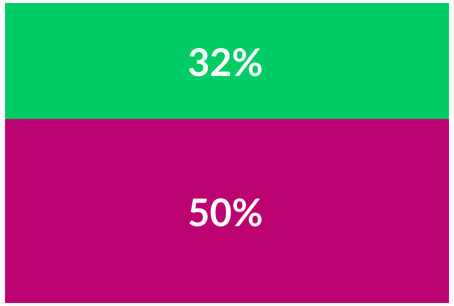


Perception of Safety this Spring - Indoor Event

Safe
Unsafe

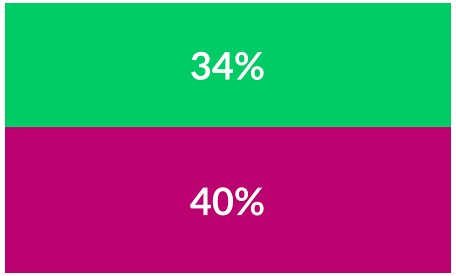
Large Indoor Event

(+6%)



Small Indoor Event

(+6%)



Base n = 750

Confidence in indoor events sees a significant increase since Nov as restrictions lift

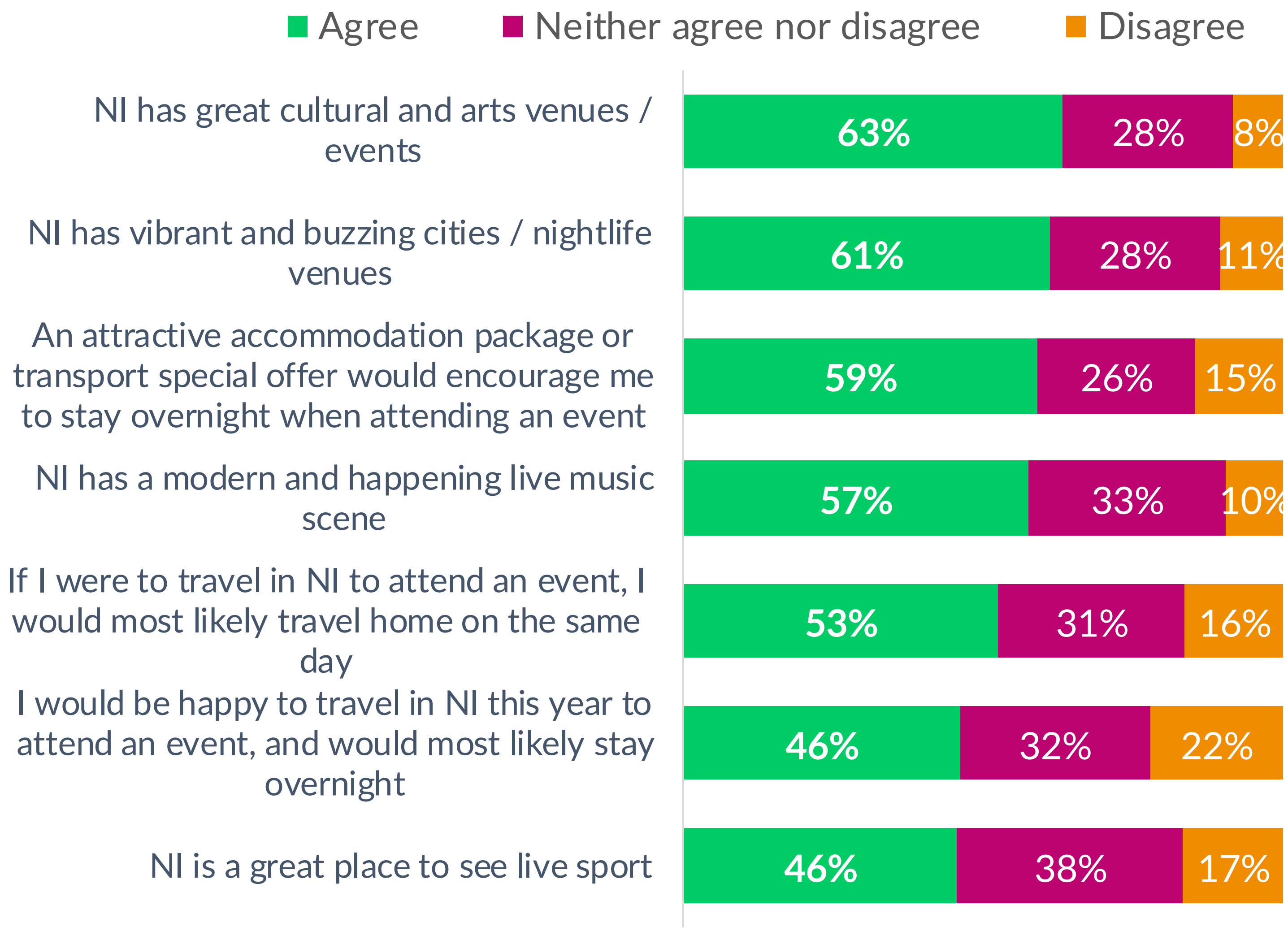
High net positive scores for outdoor events in particular

G1. How safe would you feel attending the following live event types in the winter / spring?

NI residents feel **very positive** about cities, events and venues in NI

Base n = 450

NI agree statements



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

tourism northernireland

SPARK The Strategic Insight Agency