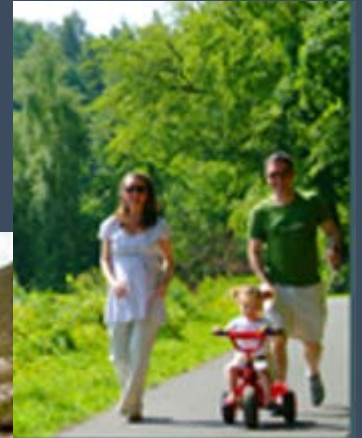
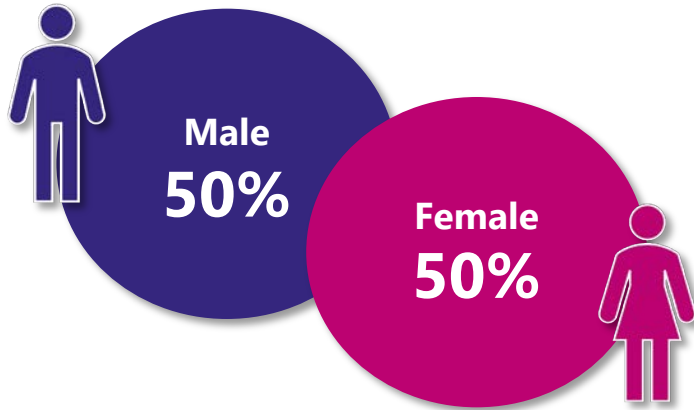


Consumer Sentiment NI Market November 2020



We interviewed a robust, nationally representative sample of 402 in the **Northern Ireland**

GENDER



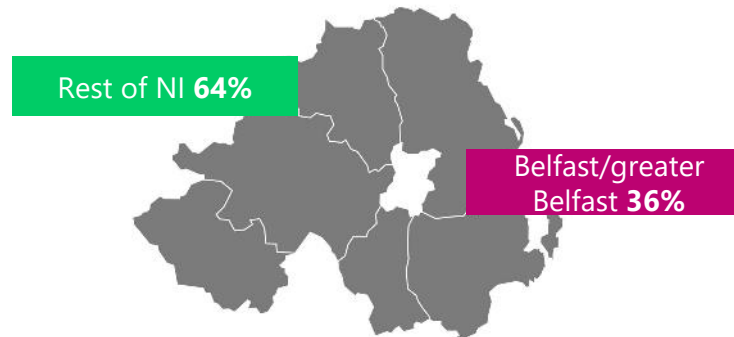
SOCIAL GRADE



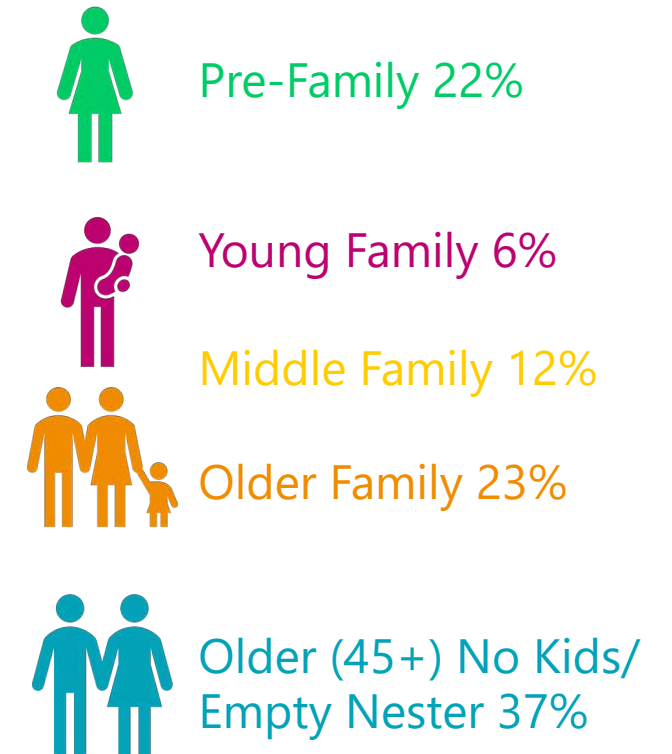
AGE



REGION



LIFESTAGE



For analysis purposes, we have pulled out three key segments



Aspiring Families

30%



Social
Instagrammers

14%



Quality Seekers

23%

Key Findings – I

The sense of pessimism has remained high while anxiety levels have increased

- Anxiety in relation tourism activity will linger after restrictions are lifted
- Activities where people have more control over social distancing should be the focus for now

While fear of contracting Covid-19 is still the key barrier - growing perception that holiday exp will be limited

- Mandatory face masks and sanitisation stations key to reassuring safety
- Focusing on highlighting activities that can still deliver on the pre-pandemic experience

Northern Ireland is strongly associated with being good value for money

- VFM is a key advantage for NI particularly relative to taking a holiday in ROI and should be leveraged.

Key Findings – II

Majority of breaks in NI and abroad over the past 6 months were cancelled

- Making the process of rescheduling NI breaks as easy as possible important going forward
- Exclusive package offerings will be effective in encouraging overnight stays

The availability of eating options has become more of a trigger in encouraging overnight stays

- Packaged holiday offers including quality food and drink options and itineraries will give potential holiday makers more assurance

Campaign awareness is strong and resonating well with key younger segments

- Recall the EAGS brand has seen a jump
- TV campaign performing well at communicating the variety of things to do in NI and conveying excitement and fun

Covid-19 and Tourism



A sense of pessimism still widespread with negative outlook highest amongst mid-families and social Instagrammers

Wave 2

Wave 1

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



More negative outlook among **Mid Families** (70%), **Social Instagrammers** (68%) and those living in **Antrim** (65%)



More positive outlook among those living in **Down** (17%)



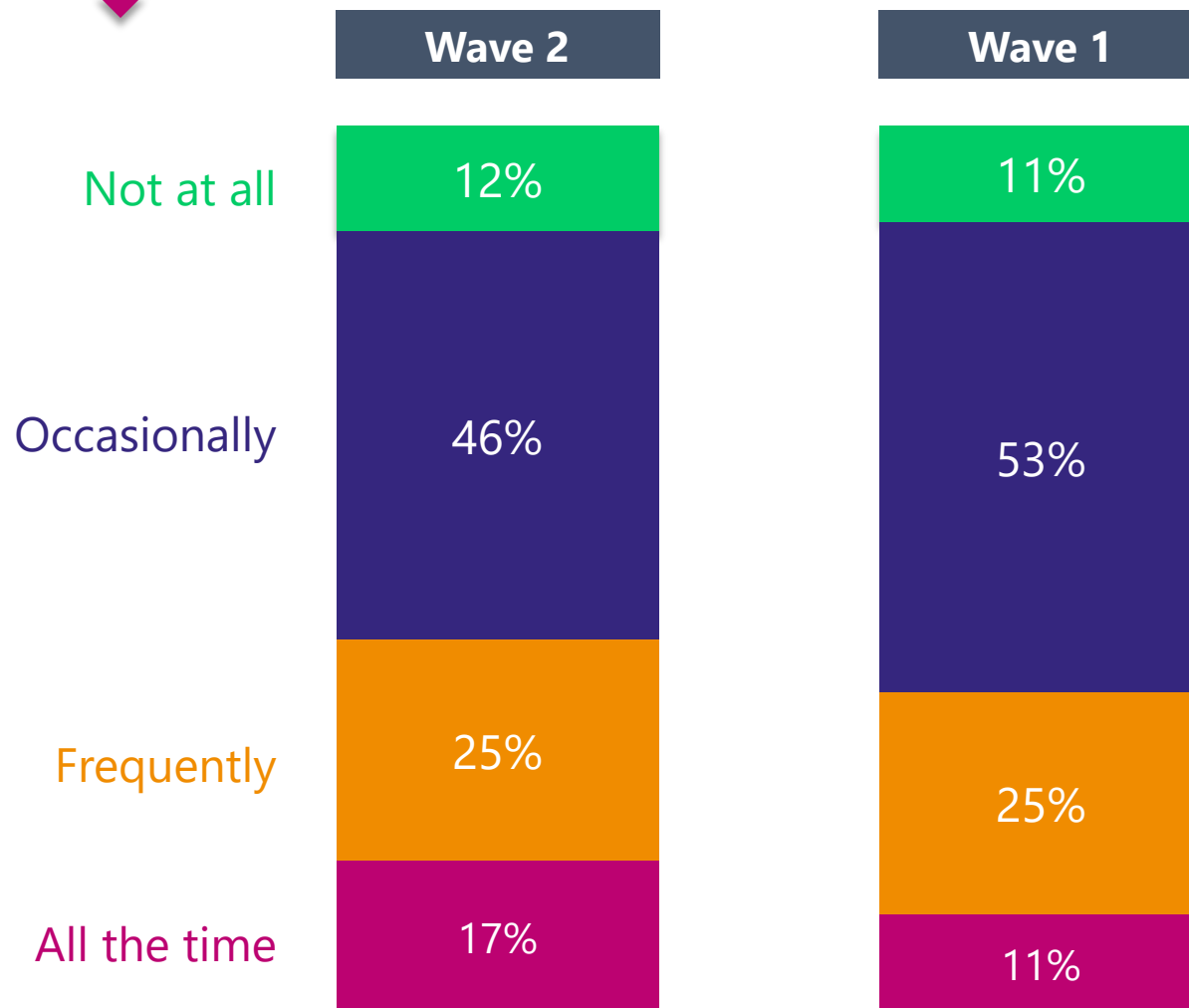
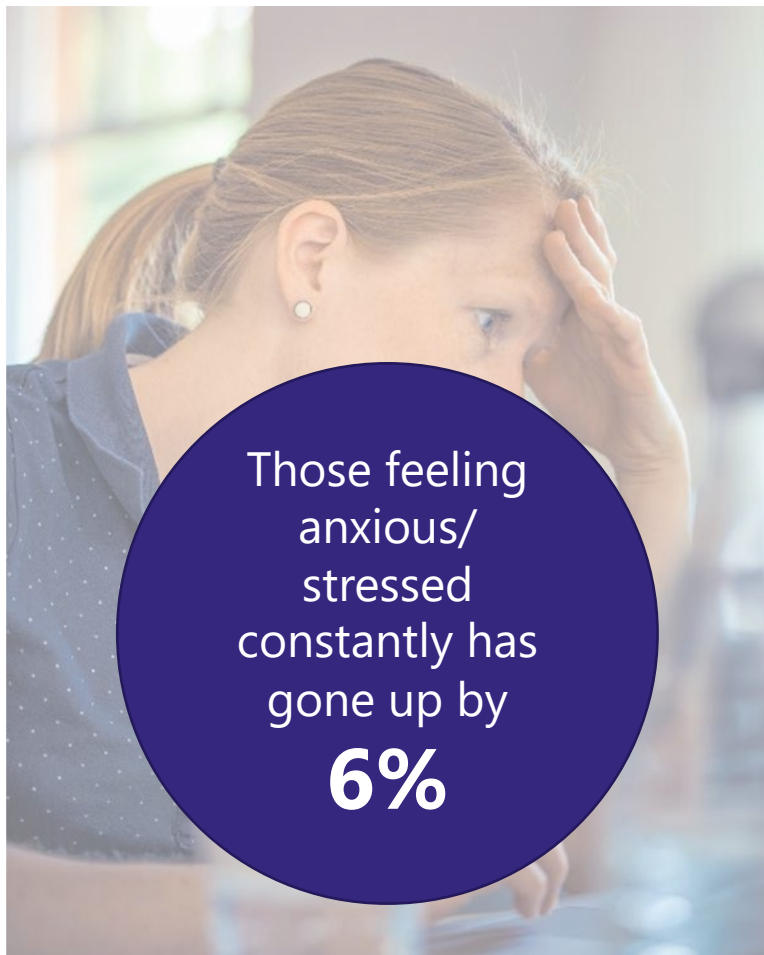
Base n = 402

Q1a. Regarding the situation of Coronavirus in the Northern Ireland and the way it is going to change in the coming month, which of the following best describes your opinion?

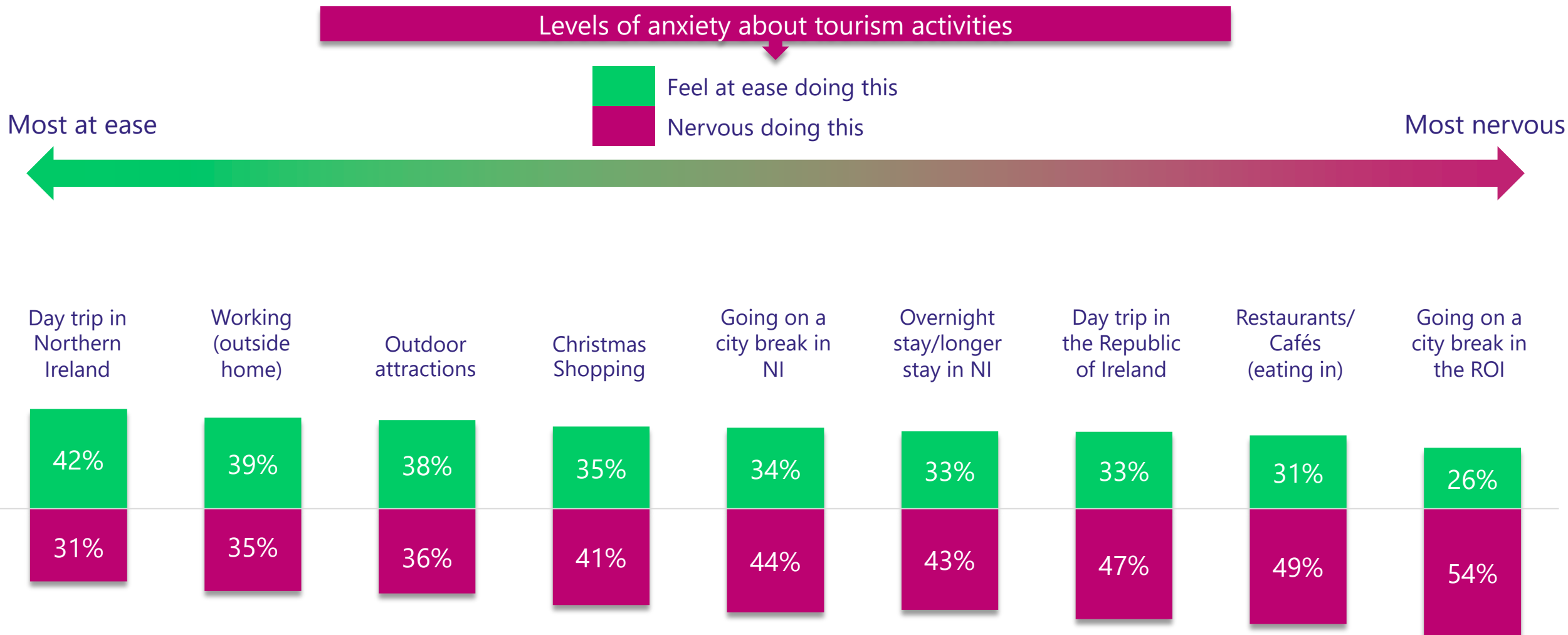
More are now feeling higher levels of stress/anxiety

Safety Reassurance still key to encouraging travel

How often have you felt anxious / concerned during Covid?



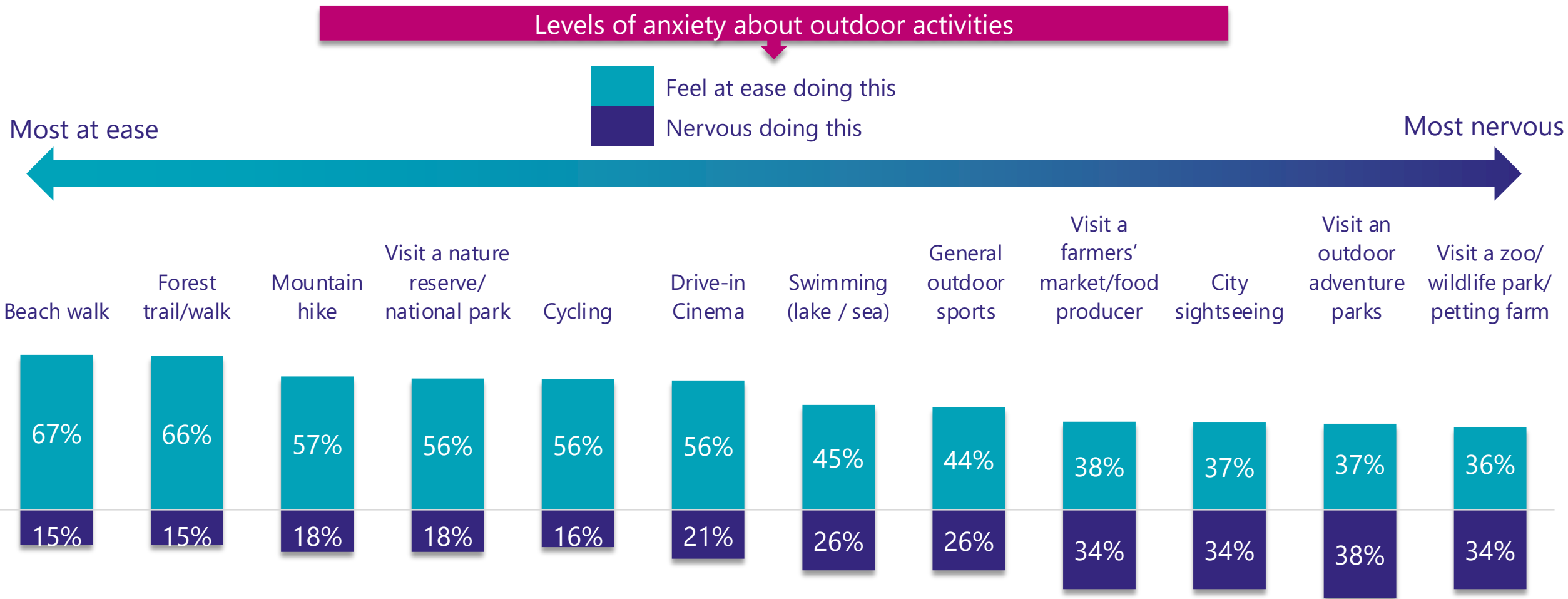
When restrictions begin easing, **tourism anxiety will linger** – Biggest opp = day trips, vital to improve confidence in eating in



N = 402

Q4a. When restrictions begin to ease and places start to re-open, how would you feel about engaging in these activities for the remainder of the year?

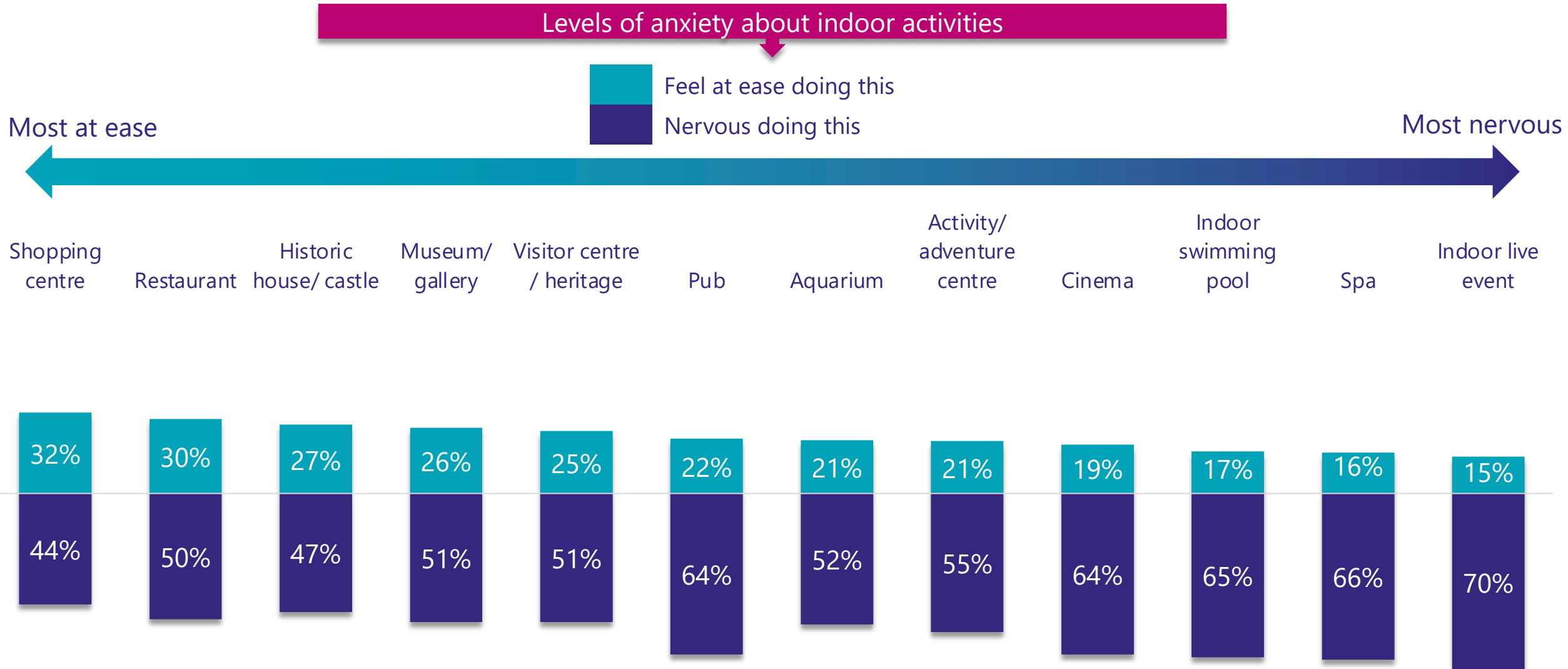
2 in 3 feeling at ease with Beach & Forest walks – These outdoor activities should be dialled up in comms



N = 402

Q7a. When restrictions begin to ease and places start to re-open, how would you feel about engaging in these outdoor activities in the weeks coming up to Christmas/New Years?

High levels of anxiety towards indoor activities – advertising depicting indoor activity should focus on spaciousness



N = 402

Q7b. When restrictions begin to ease and places start to re-open, how would you feel about engaging in these indoor activities in the weeks coming up to Christmas/New Years?

Mandatory wearing facemasks & the availability of handwashing/ sanitizer key to building confidence – **visors less effective**



63%
Would be nervous visiting an indoor attraction

Give you More Confidence to Visit an Indoor Attraction



Mandatory wearing of facemasks

59%



Multiple handwashing/
hand sanitizer locations

56%

Social distance markings in confined spaces **52%**

Frequent & visible cleaning practiced **50%**

Strict capacity management **48%**

Temperature tests on entry **47%**

Safe ventilation **44%**

Hygiene signage and posters **38%**

Covid-19 Safety certificate **37%**

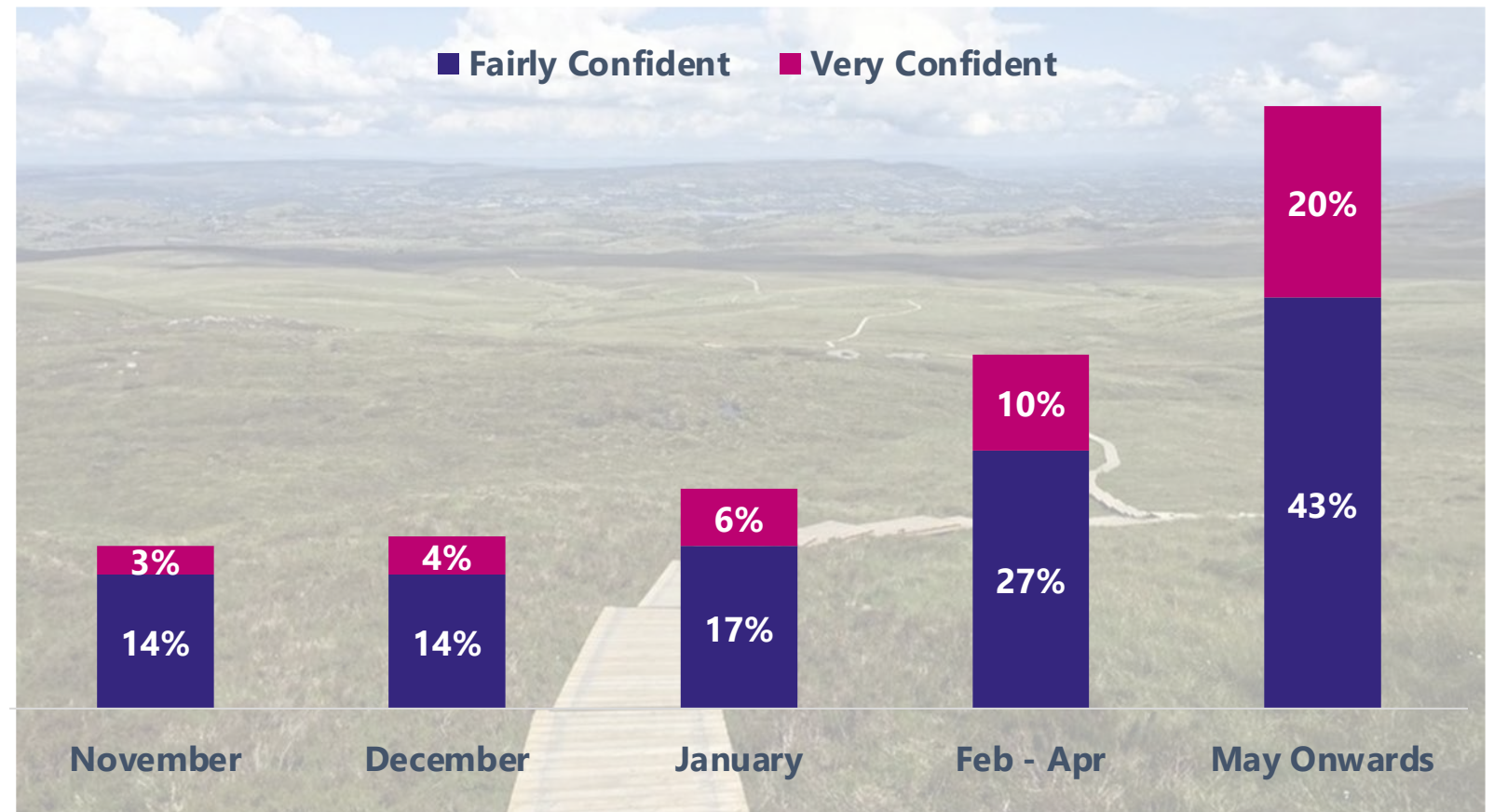
Mandatory wearing of face visors **28%**

Confidence in taking an NI break over the next few months is low – assurance needed to encourage early bookings

Just
17%

Confident in being able to holiday in NI in November

Highest amongst Social Instagrammers (25%) and Pre-families (26%)



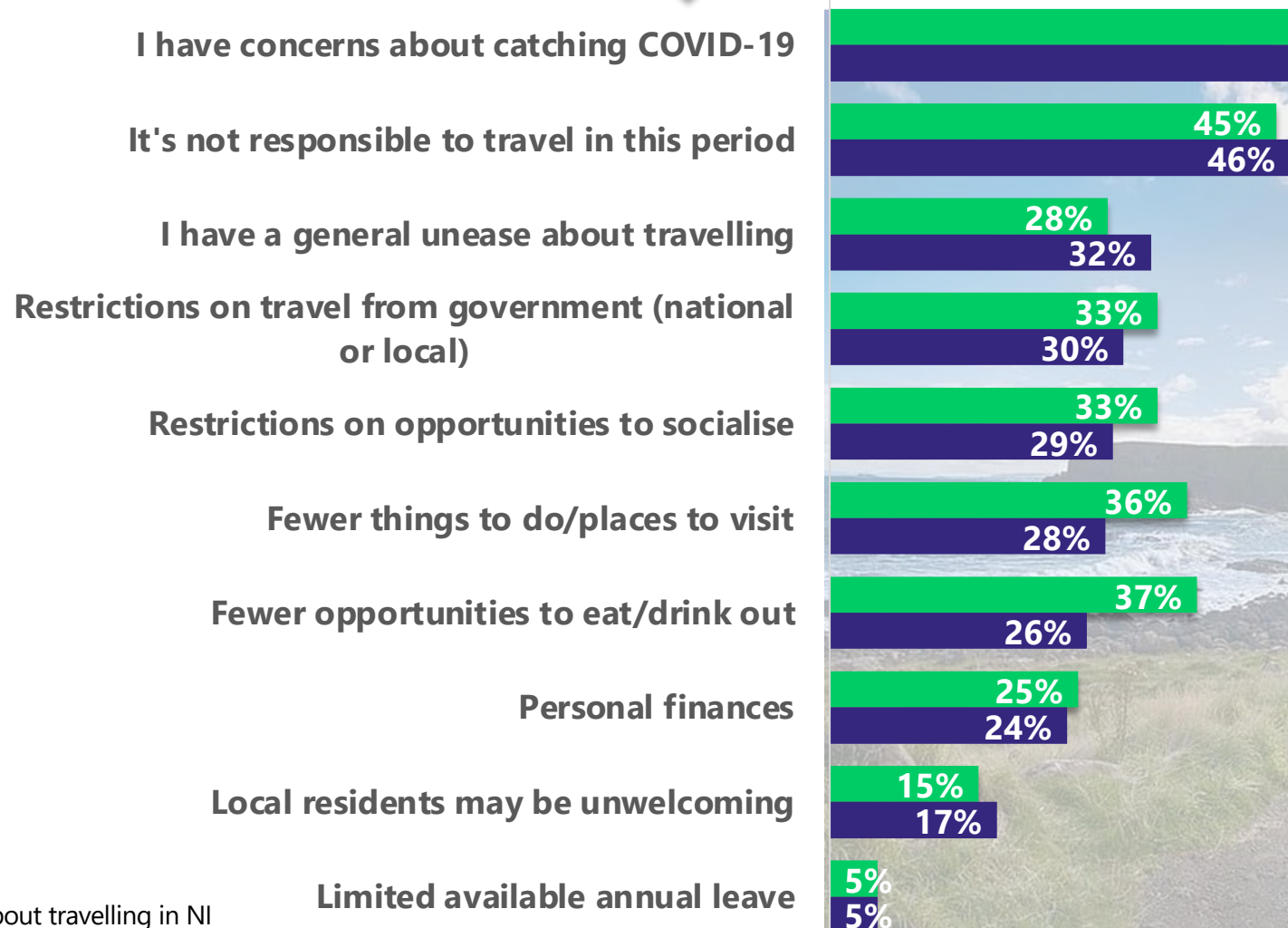
N = 402

Q5a. How confident are you that you would be able to go on a Northern Ireland short break / holiday in the following months (i.e. you won't have to cancel)?

Growing perception little to do on an NI Trip – highlight activities that can still be done during pandemic

Why would you feel uncomfortable taking a break in NI over the next few months?

Wave 2
Wave 1



Safety assurance is still key!



N = 305, all not confident about travelling in NI

**slight change to the wording of the question*

Q6a. Which of the following contribute to you being 'not very confident' or 'not at all confident' about taking a Northern Ireland short break or holiday over the next few months?

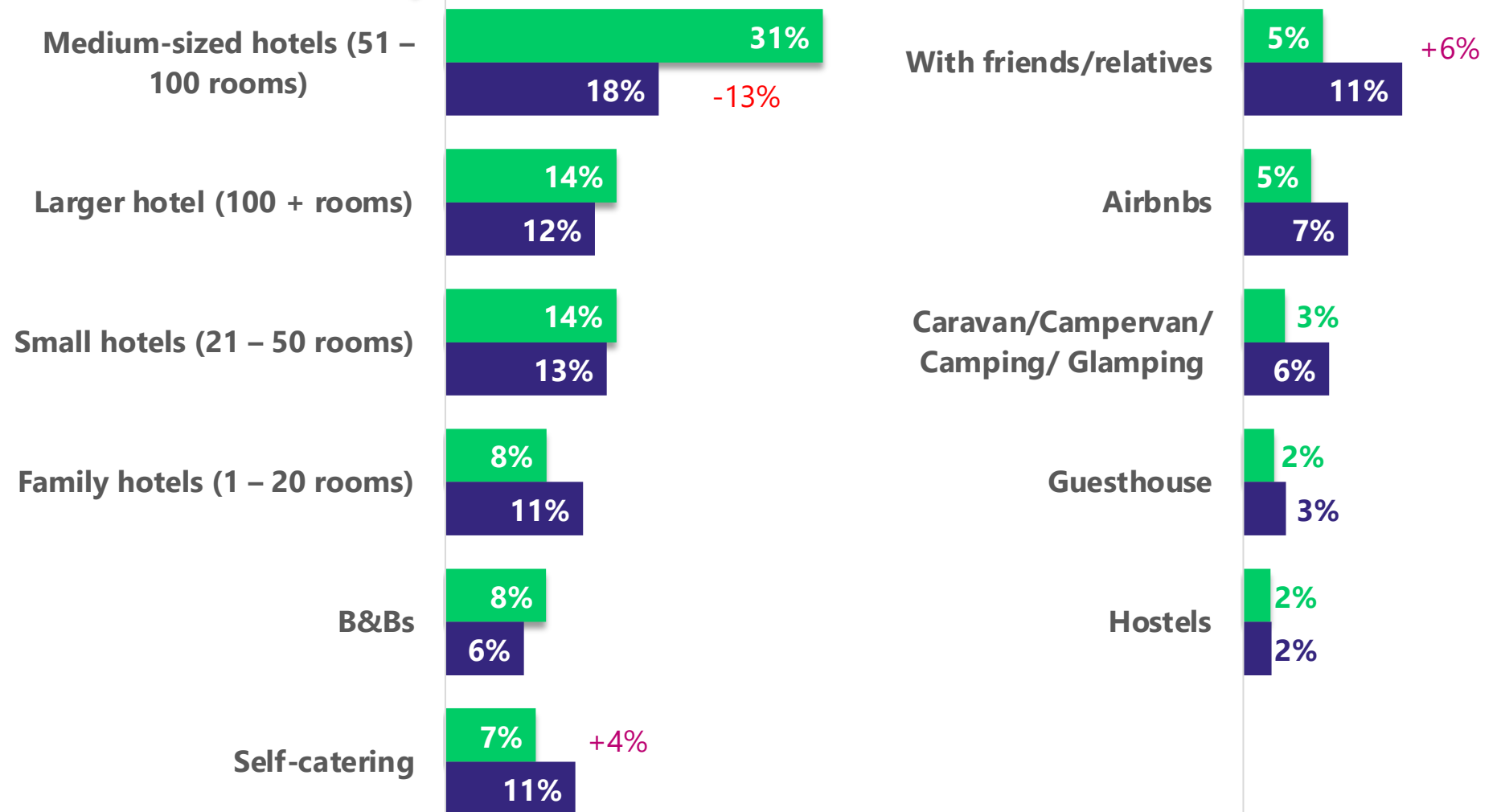
While Medium-sized hotels are typically most used, they are likely to be impacted most by safety concerns

Normally Stay when taking short breaks Vs. Feeling most safe in

 Normally stay in
 Feel most safe



Preference for Self-catering increasing due to perceived safety



N = 402

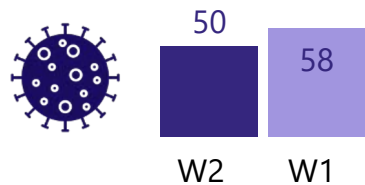
Q41. Thinking more specifically about holiday accommodation, normally when taking short trips, what type of accommodation do you tend to stay in?/Q42. And when restrictions begin to ease and places start to re-open, which type of accommodation would you feel most safe staying at?

Drivers & Perceptions of a Domestic Holiday

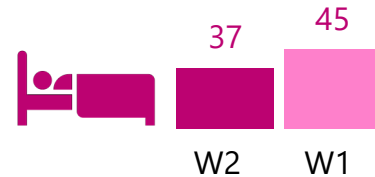


Safety and security still the key consideration - the availability of eating options has become relatively more important

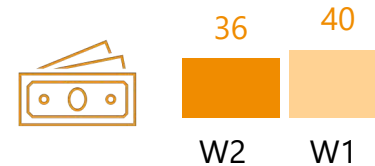
Short Break in Northern Ireland – Key Considerations



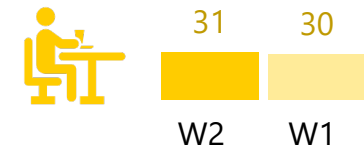
Safety & security specifically related to Covid-19



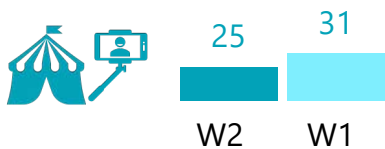
Accommodation costs



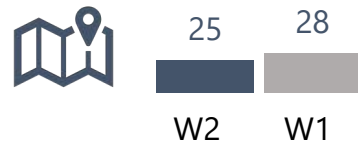
Value for money in the destination



Availability of options for eating in / out



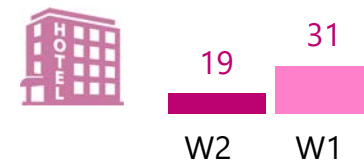
Attractions to visit in the area



Ease of travelling/distance to destination



Ease of travelling within destination



Accommodation choices

Awareness of the Safety Mark has marginally increased and has become **more effective in instilling confidence**

Awareness of Mark



Wave 2
33%

Wave 1
30%

Confidence the mark gives you that a business is safe

N = 150

11%

It gives me a lot of confidence

31%

Its gives me confidence

50%

It gives me a little confidence

8%

It gives me no confidence

92% offering at least a little confidence

UP
9%

N = 402

Q10. Are you aware of the 'We're Good to Go' mark?/Q11. To what extent does the 'We're Good to Go' mark give you confidence that a tourism or hospitality business is safe to visit?

Beach and Forest walks the most preferred – A sense of control over social distance - important to dial up in advertising

Top activities they would be interested in if holidaying in NI

Walks

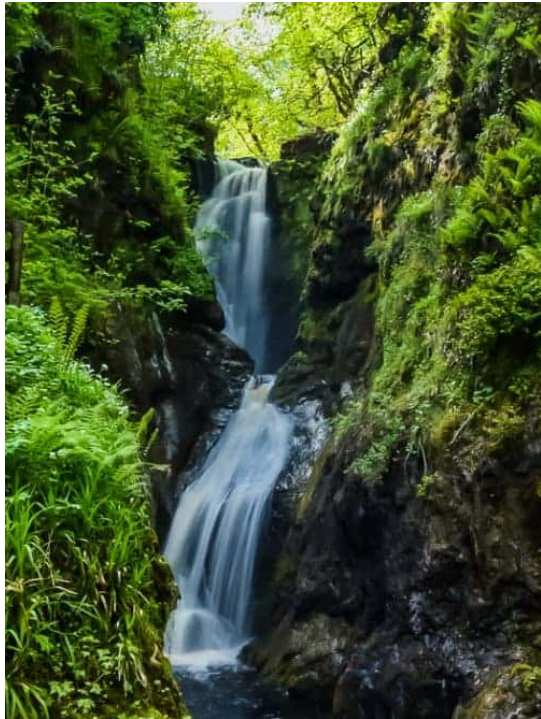


Beach 59%

Forest Trail 52%

Mountain Hike 22%

Outdoor Attractions



Nature Reserve/parks 40%

City Sightseeing 31%

Drive-in Cinema 22%

Farmers Market 22%

Zoo/Petting Farm 21%

Interest in historic houses/gardens relatively high – when travel confidence builds, potential to focus comms here

Top activities they would be interested in if holidaying in NI

Other Outdoor Exercise



Outdoor Sports 14%

Cycling 14%

Swimming 12%

Adventure Park 11%

Indoor Attractions



Historic House/Garden 30%

Museum/Gallery 21%

Visitor Centre 18%

Xmas Hotel Experience 16%

Spa/Relaxation experience 15%

Tours 11%

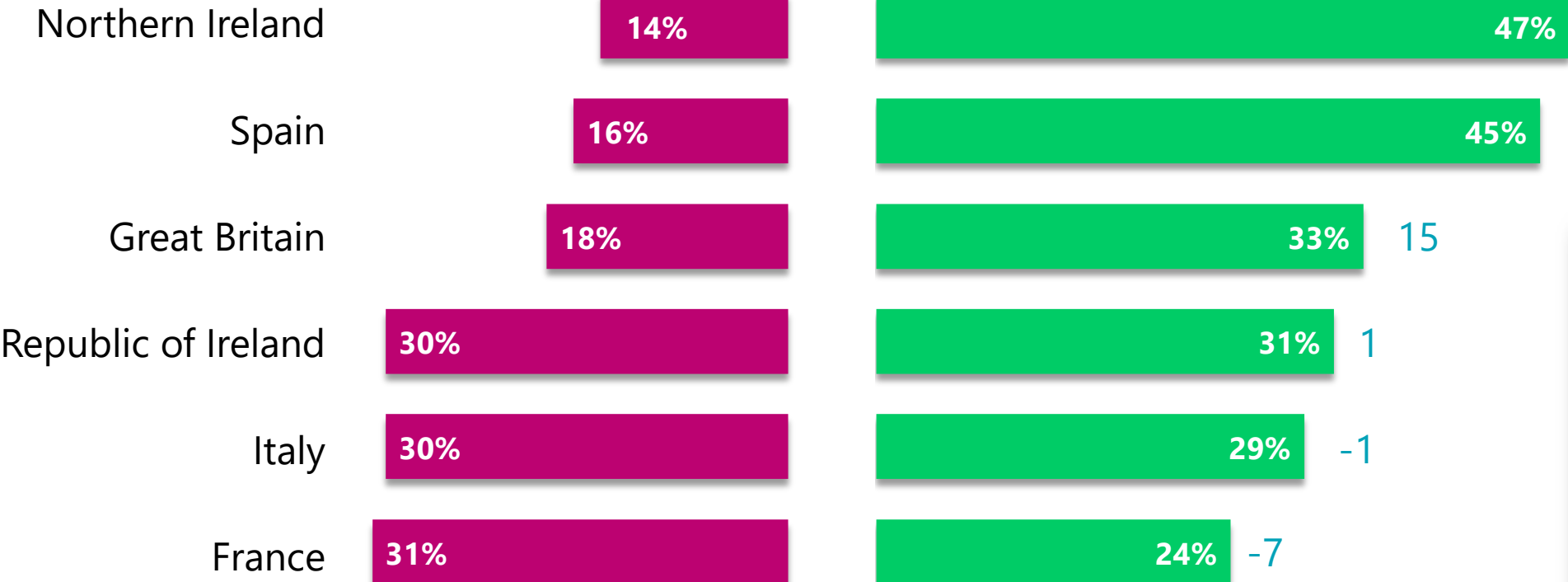
VFM is a key strength for NI particularly relative to ROI - Comms should highlight NI's high quality standards at a reasonable price

Value for Money

Poor Value for Money

Good Value for Money

Net Score



Travel Intentions



7 in 10 breaks in NI were cancelled - making the process of rescheduling breaks as easy as possible important going forward

% of total sample planning to take a break over the past 6 months...

In Northern Ireland

31%



72% of breaks in Northern Ireland were cancelled

Of those who cancelled...

57% did not reschedule their break in Northern Ireland

43% rescheduled their break for this year or next year

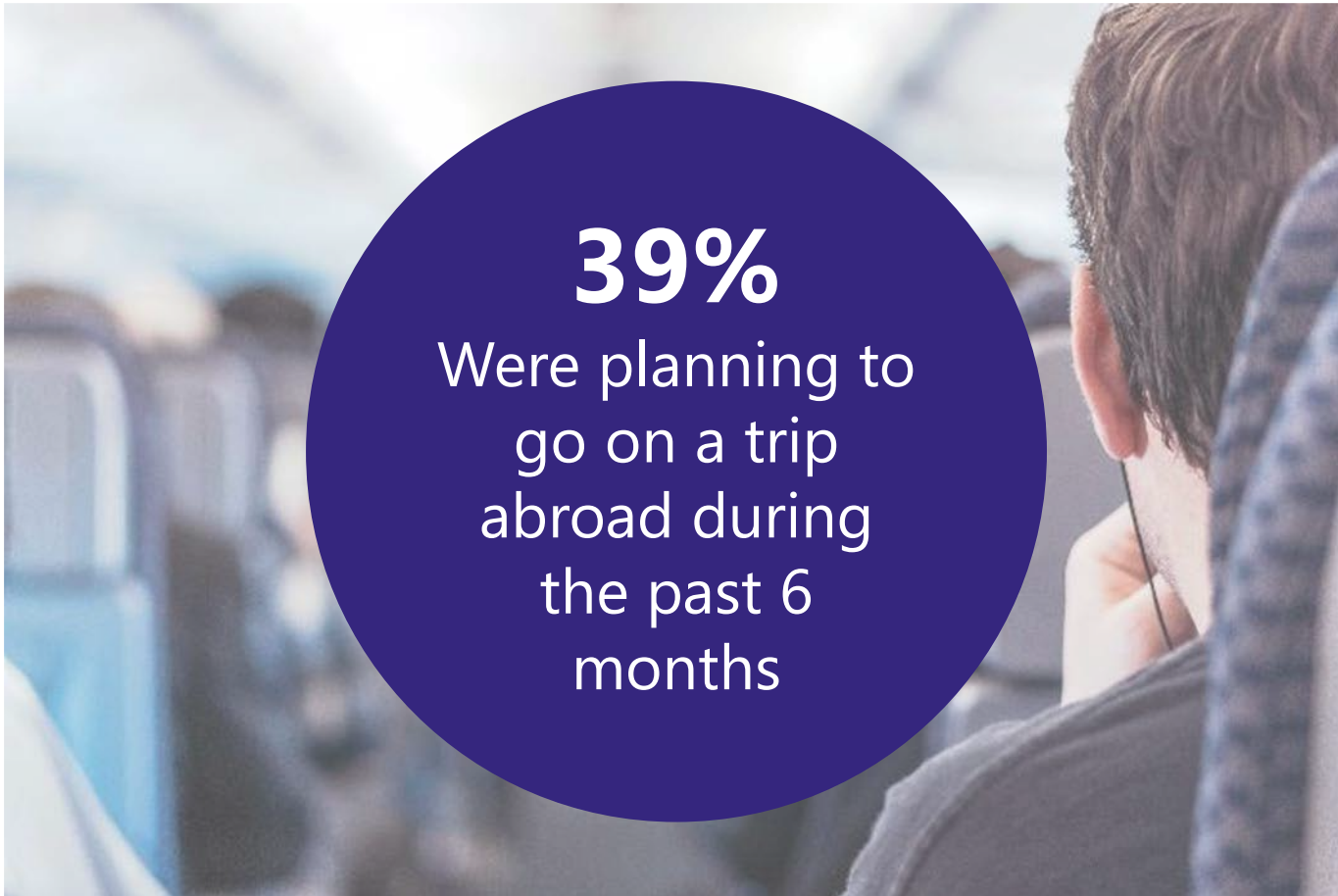
In the Republic of Ireland

25%

Abroad

39%

The majority of trips planned in the second half of 2020 were cancelled



4 in 5 of these breaks abroad were cancelled due to Covid-19



With a large proportion of holidays abroad not being rescheduled, **opportunity to convert to NI breaks**



54% of cancelled trips abroad were not rescheduled

Those who cancelled their holiday abroad = 123

While **15%** of those who cancelled their trip decided to **take a break in NI instead**

Those who cancelled their holiday abroad = 123

Exclusive package offerings will be effective in encouraging overnight stays – eating out options and safety significant triggers

What would encourage you to stay overnight?



**(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.)*

N = 152

Short breakers are waiting until Mar/Apr next year – important to have holiday packages ready



How much of your short trip have you planned?

N = 84



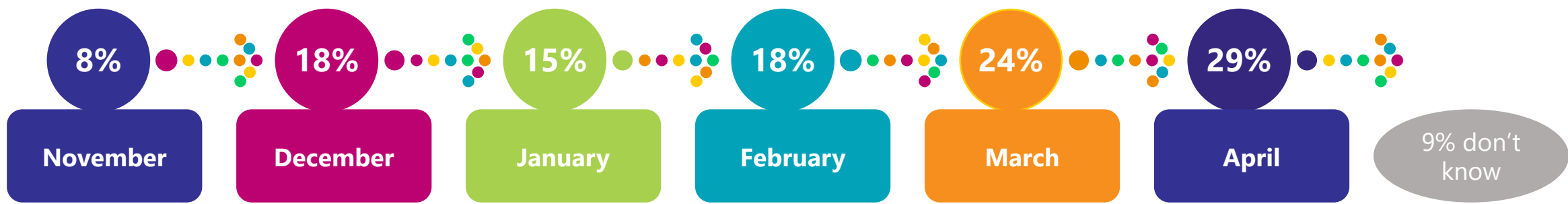
Wave 1 figures: 19% 13% 68%

N = 402

21% intend to take a short break in Northern Ireland
Wave 1: 25%

N = 84

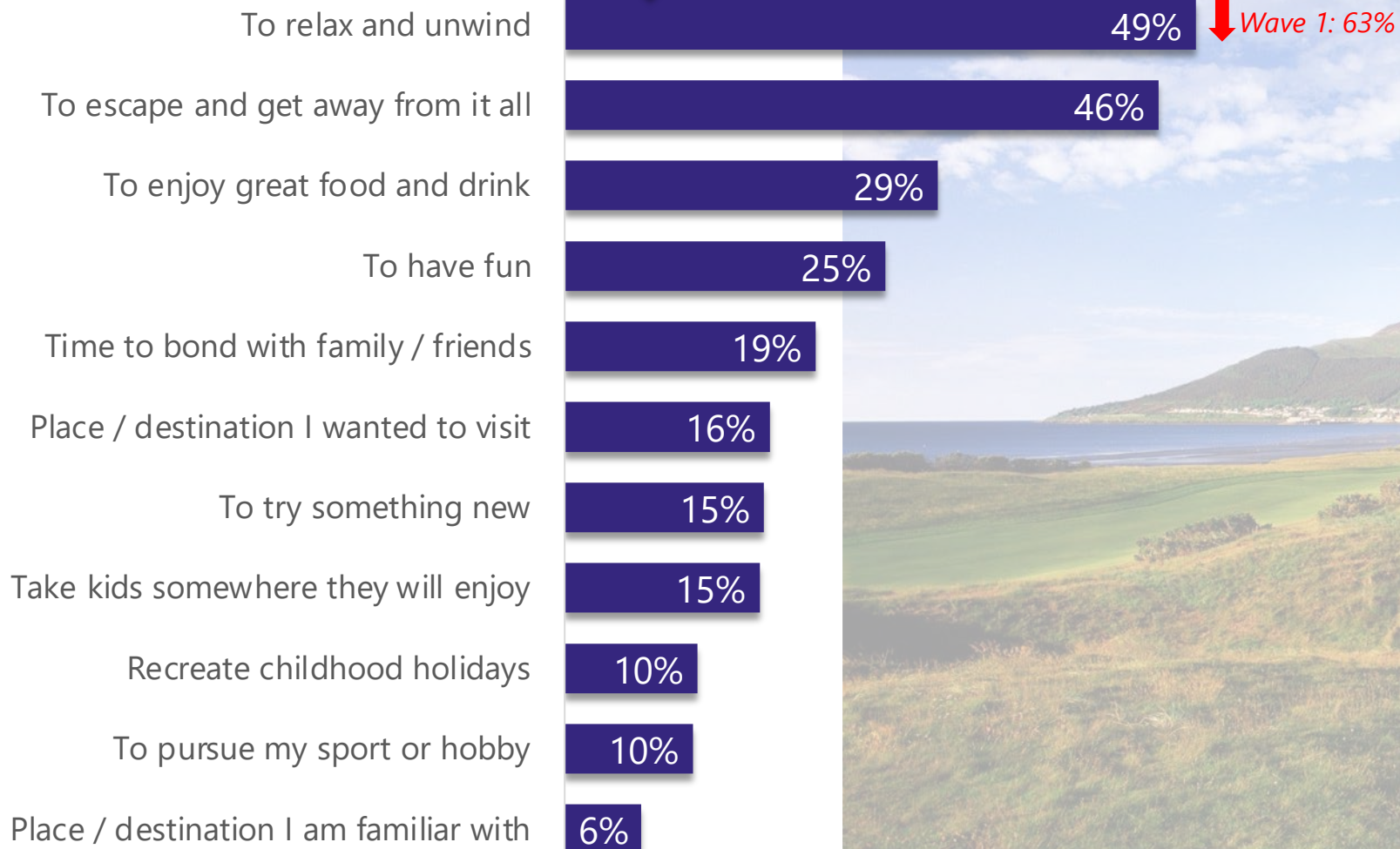
*Intention to take a short break to Northern Ireland in:



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

Relaxing and unwinding and getting away from it all **still the key motivations to taking a break in NI**

Motivations for longer / short breaks (combined)



N = All those who intend on taking a short or long trip – 93

Q26. Thinking about your upcoming SHORT / LONG trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the short trip? / Q27. Who do you intend on travelling/sharing your SHORT / LONG holiday(s) in Northern Ireland with?