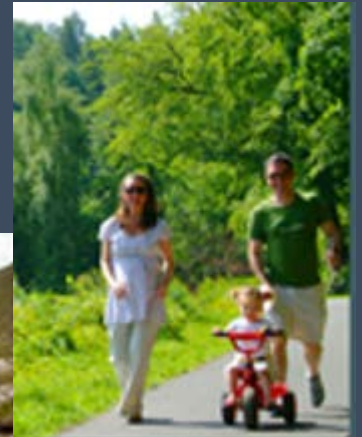


# Consumer Sentiment ROI Market November 2020

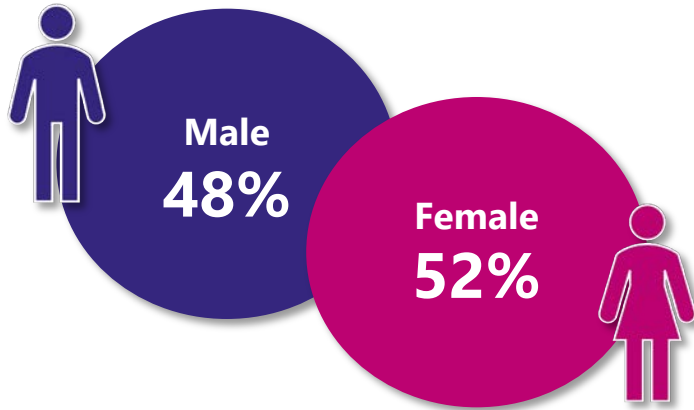


tourism  
northernireland



# We interviewed a robust, nationally representative sample of 752 in the **Republic of Ireland**

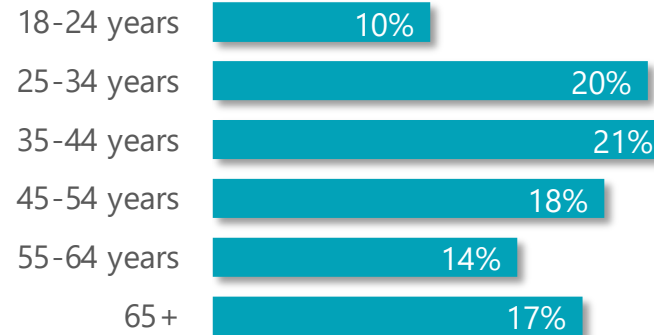
## GENDER



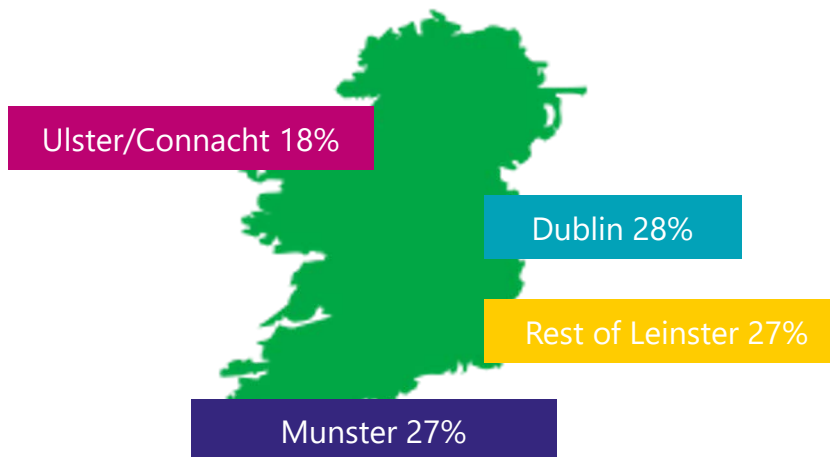
## SOCIAL GRADE



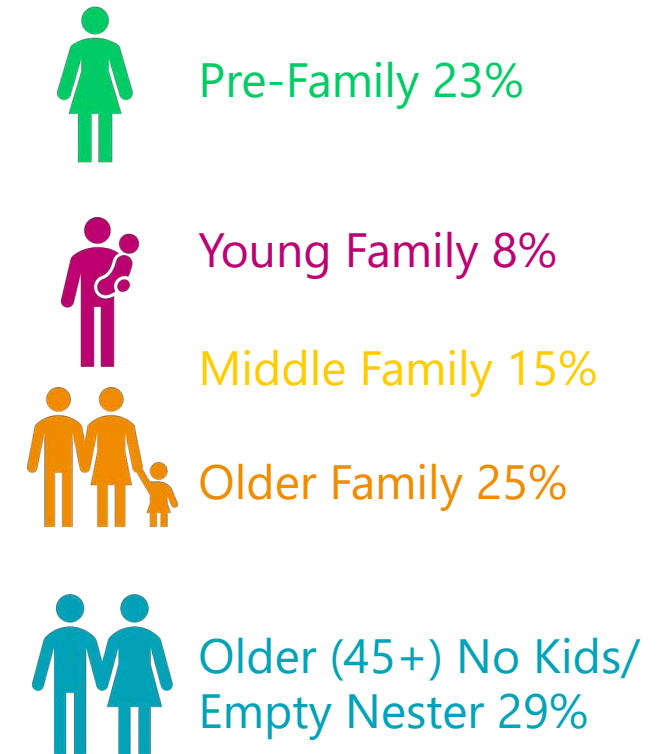
## AGE



## REGION



## LIFESTAGE



# For analysis purposes, we have pulled out three key segments



Open to ideas

**38%**



Active Maximisers

**18%**



Open-minded  
Explorers

**22%**



# Key Findings – I

Good news - **consumer sentiment is improving** – confidence in engaging in tourism activities still low

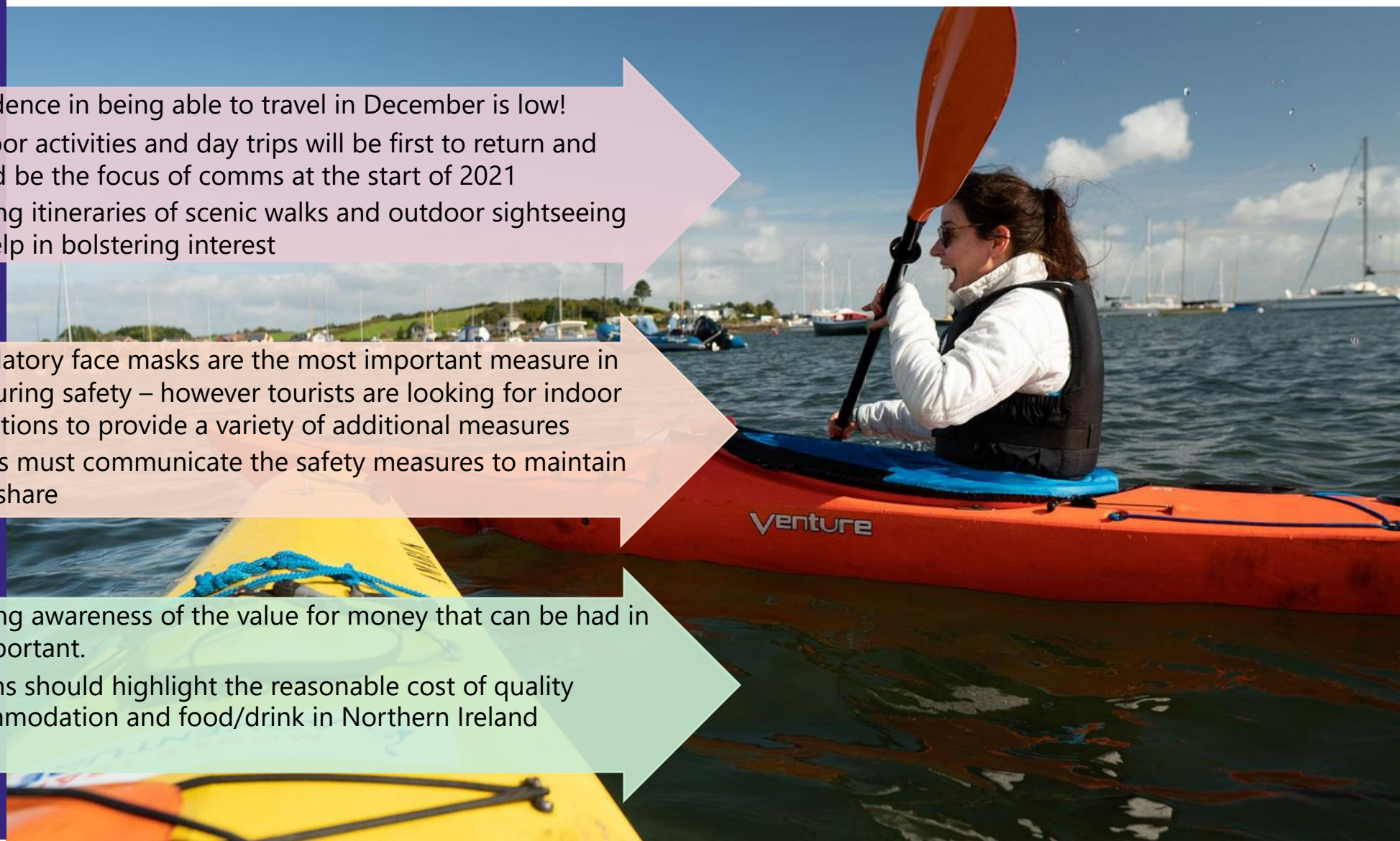
- Confidence in being able to travel in December is low!
- Outdoor activities and day trips will be first to return and should be the focus of comms at the start of 2021
- Building itineraries of scenic walks and outdoor sightseeing will help in bolstering interest

Safety concerns, travel restrictions and a sense of responsibility the **key barriers** to travel to NI

- Mandatory face masks are the most important measure in reassuring safety – however tourists are looking for indoor attractions to provide a variety of additional measures
- Hotels must communicate the safety measures to maintain their share

Northern Ireland is considered **better value for money** than the Republic of Ireland

- Building awareness of the value for money that can be had in NI important.
- Comms should highlight the reasonable cost of quality accommodation and food/drink in Northern Ireland



# Key Findings – II

With the majority of trips abroad cancelled – **opportunity to reschedule in NI rather than ROI**

- Embrace the 'good differences' between ROI and NI
- Continuing to dial up breadth of activities & providing itineraries will persuade more to stay overnight

The **desire to escape and get away from it all is lessening** – people are starting to look for more excitement and fun

- Appetite for a more exciting holiday involving plenty of activities growing
- This should be brought into comms in anticipation of March onwards when people start taking longer trips



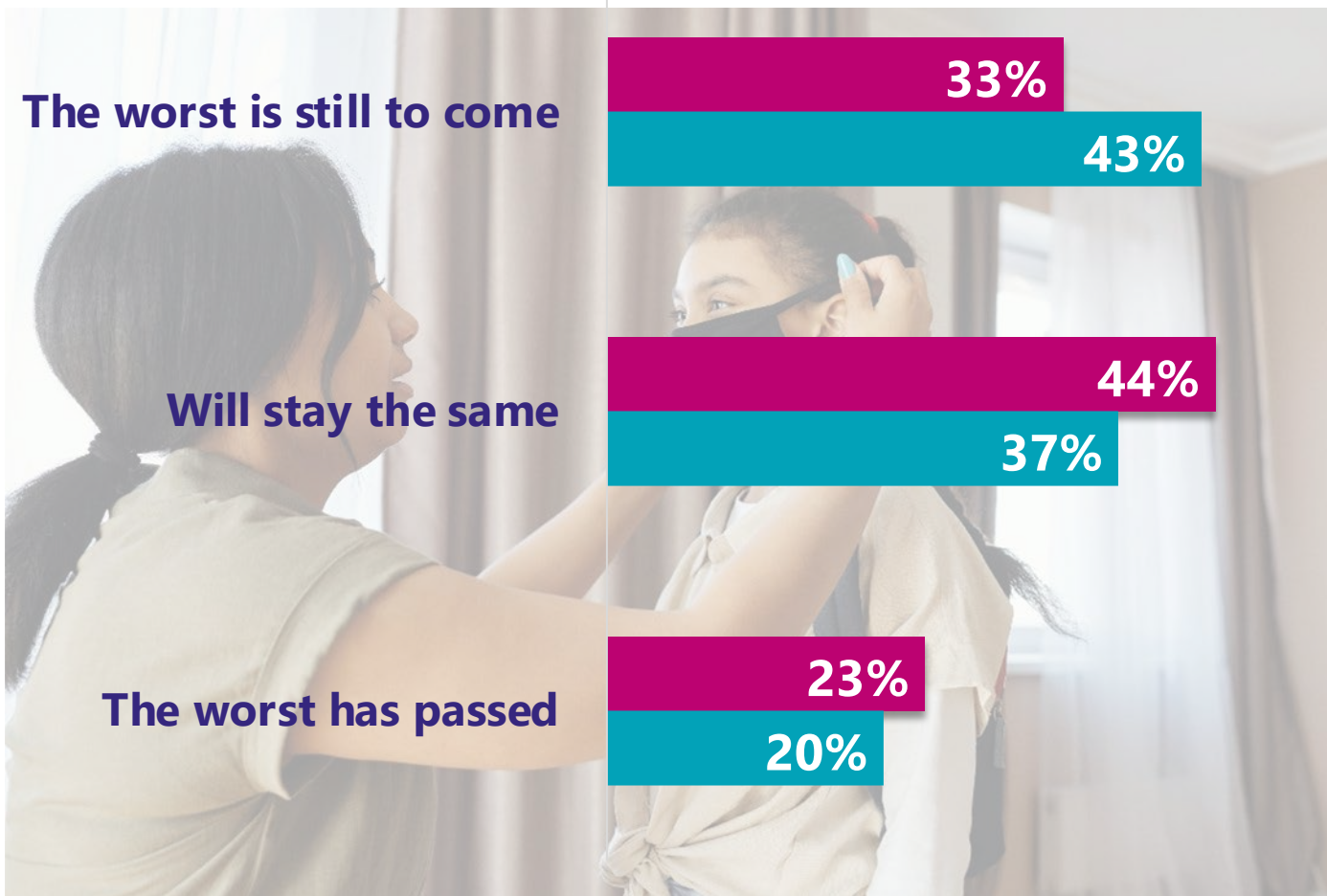


# Outlook in ROI has improved with older cohorts being most positive – However, only 23% believe the worst has passed

Wave 2

Wave 1

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



More negative outlooks among Active Maximisers (40%) and ABC1s (37%)



More positive outlooks among those over 65 (33%)



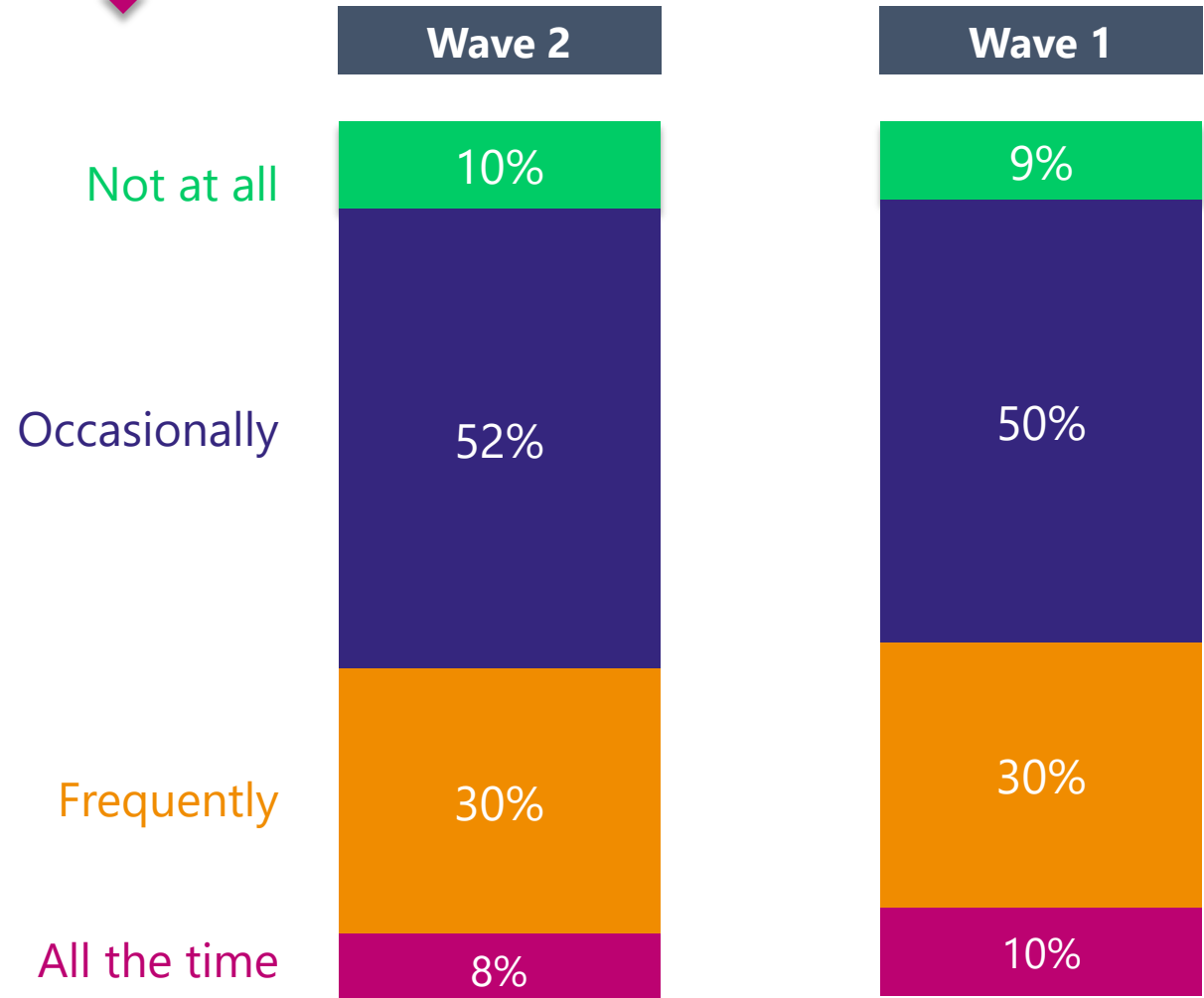
Base n = 752

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?

# Encouragingly, anxiety levels haven't increased in ROI

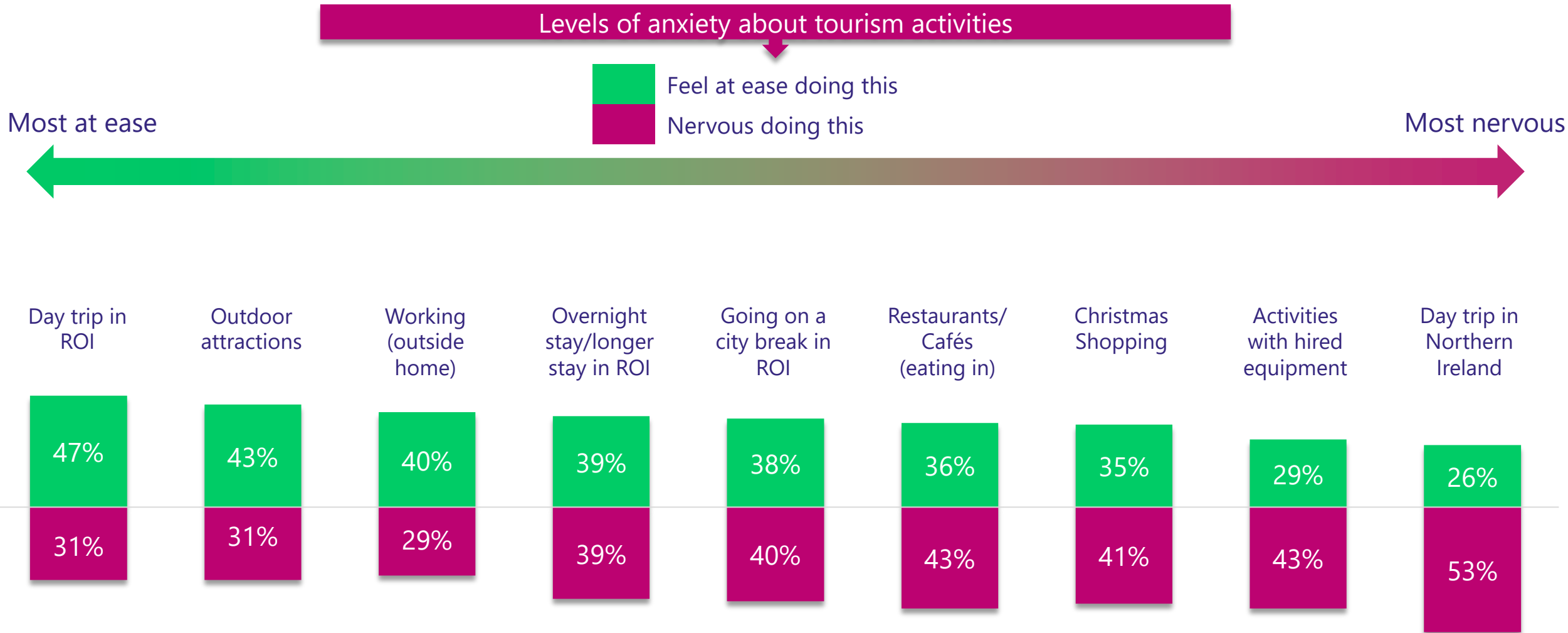
## Safety Reassurance still key to encouraging travel

How often have you felt anxious / concerned during Covid?



# Majority not ready to take day trips in NI in December

## Work required to build travel confidence in the new year

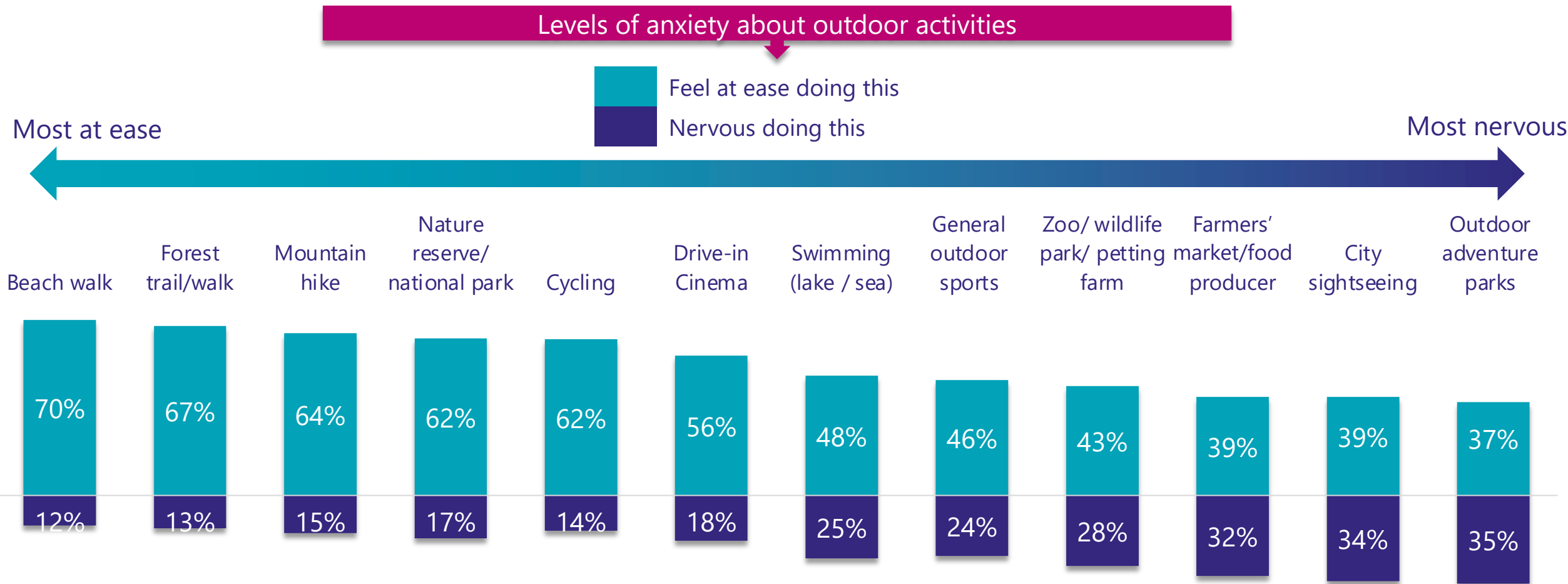


N = 752

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?



# Majority comfortable with going on scenic walks – Potential to highlight ‘hidden gems’ for tourists to discover on foot



N = 752

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?

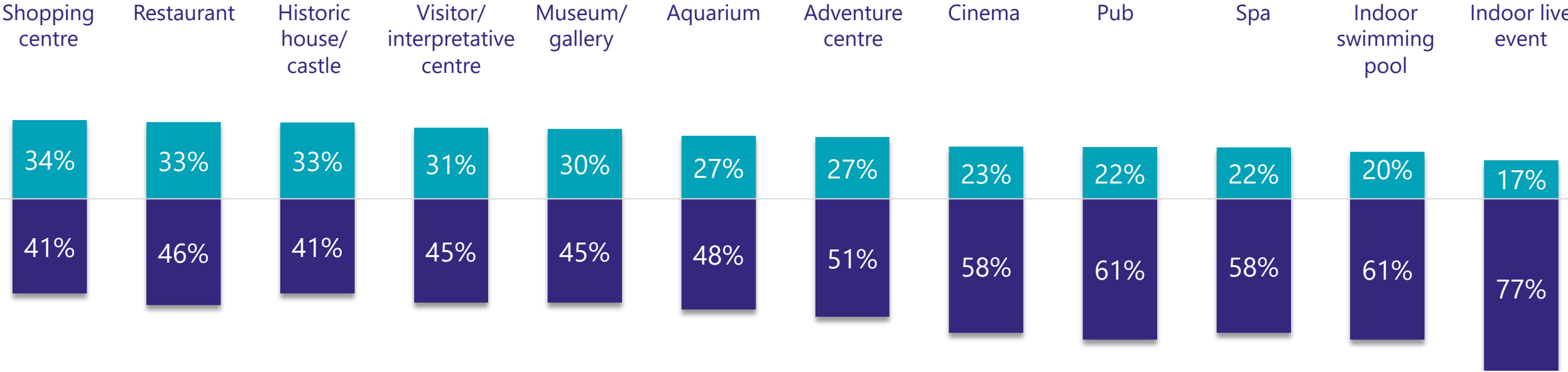
# Will take some time before people feel safe doing indoor activities – anxiety about attending indoor live events particularly high

Levels of anxiety about indoor activities

- Feel at ease doing this
- Nervous doing this

Most at ease

Most nervous



N = 752

# Mandatory facemasks most important in building confidence – Combination of measures important



**54%**  
Would be nervous visiting an indoor attraction

Give you More Confidence to Visit an Indoor Attraction

**Mandatory wearing of facemasks**

**63%**

**Multiple handwashing/ hand sanitizer locations**

**55%**

- Strict capacity management **52%**
- Social distance markings in confined spaces **50%**
- Safe ventilation **50%**
- Frequent & visible cleaning practiced **47%**

- Temperature tests on entry **46%**
- Hygiene signage and posters **38%**
- Covid-19 Safety certificate **34%**
- Mandatory wearing of face visors **30%**

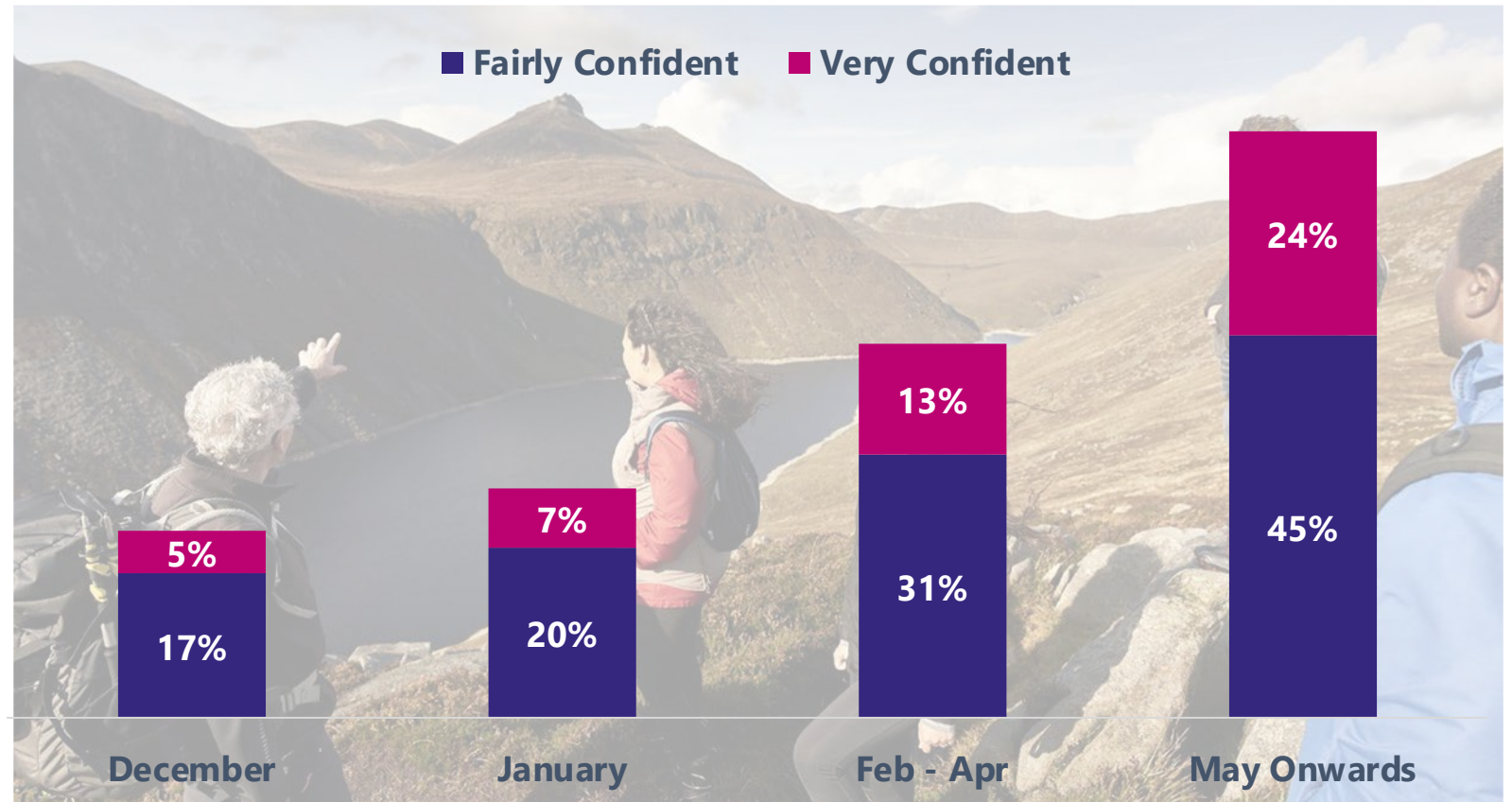
N = 752



# Confidence in Island of Ireland breaks is low for Dec/Jan – Difficult to convince people to travel this side of Xmas

Just  
**22%**  
Confident in  
being able to  
holiday on the  
Iol in December

Highest amongst  
Mid Families (38%)



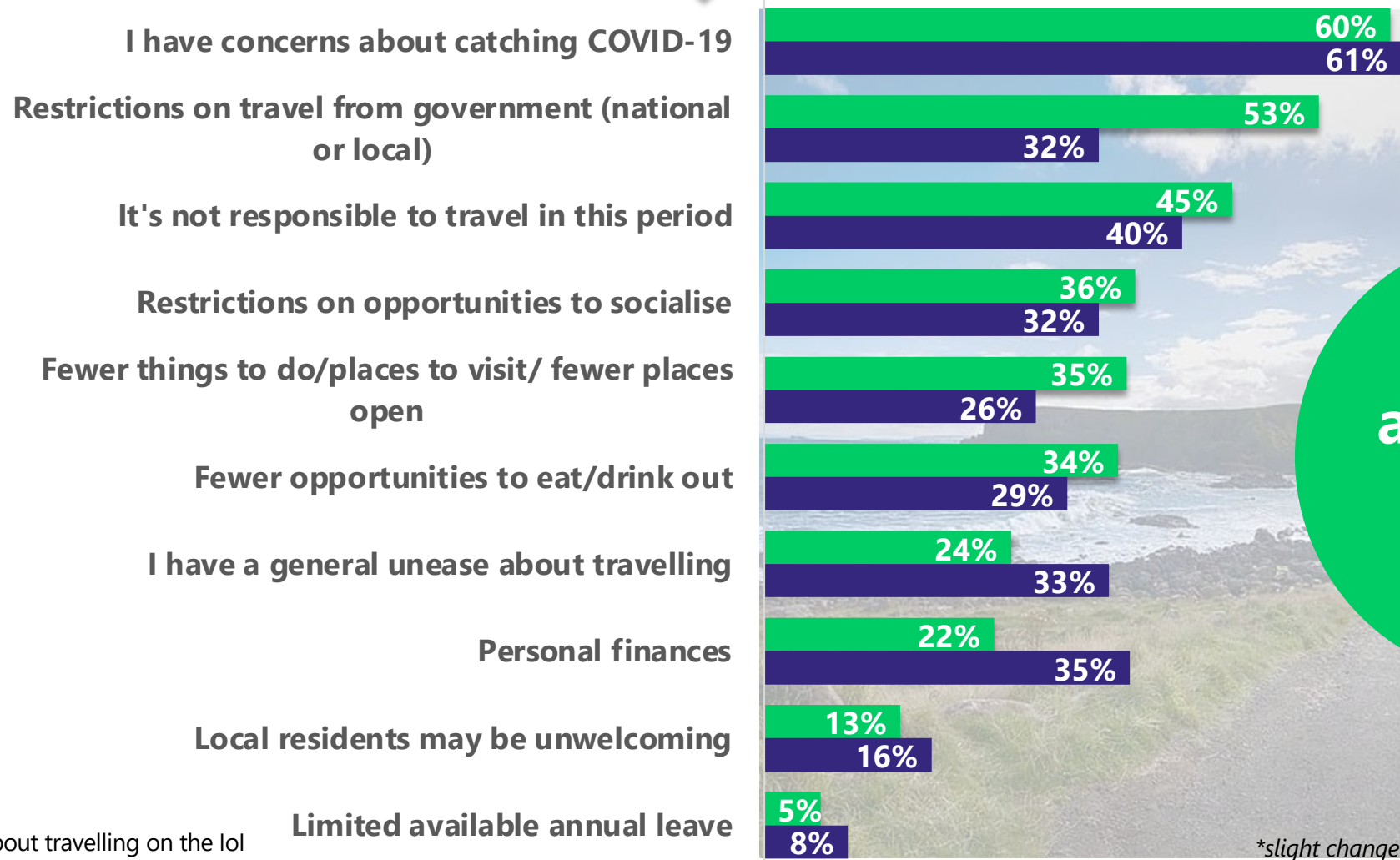
Base n = 752

Q5b. How confident are you that you would be able to go on a short break / holiday on the island of Ireland in the following months (i.e. you won't have to cancel)?

# Personal finances less of an inhibitor – but safety concerns, travel restrictions & sense of responsibility all increasingly important

Why would you feel uncomfortable taking a break on the Island of Ireland over the next few months?

Wave 2  
Wave 1



**Safety assurance is still key!**

N = 614, all not confident about travelling on the lol

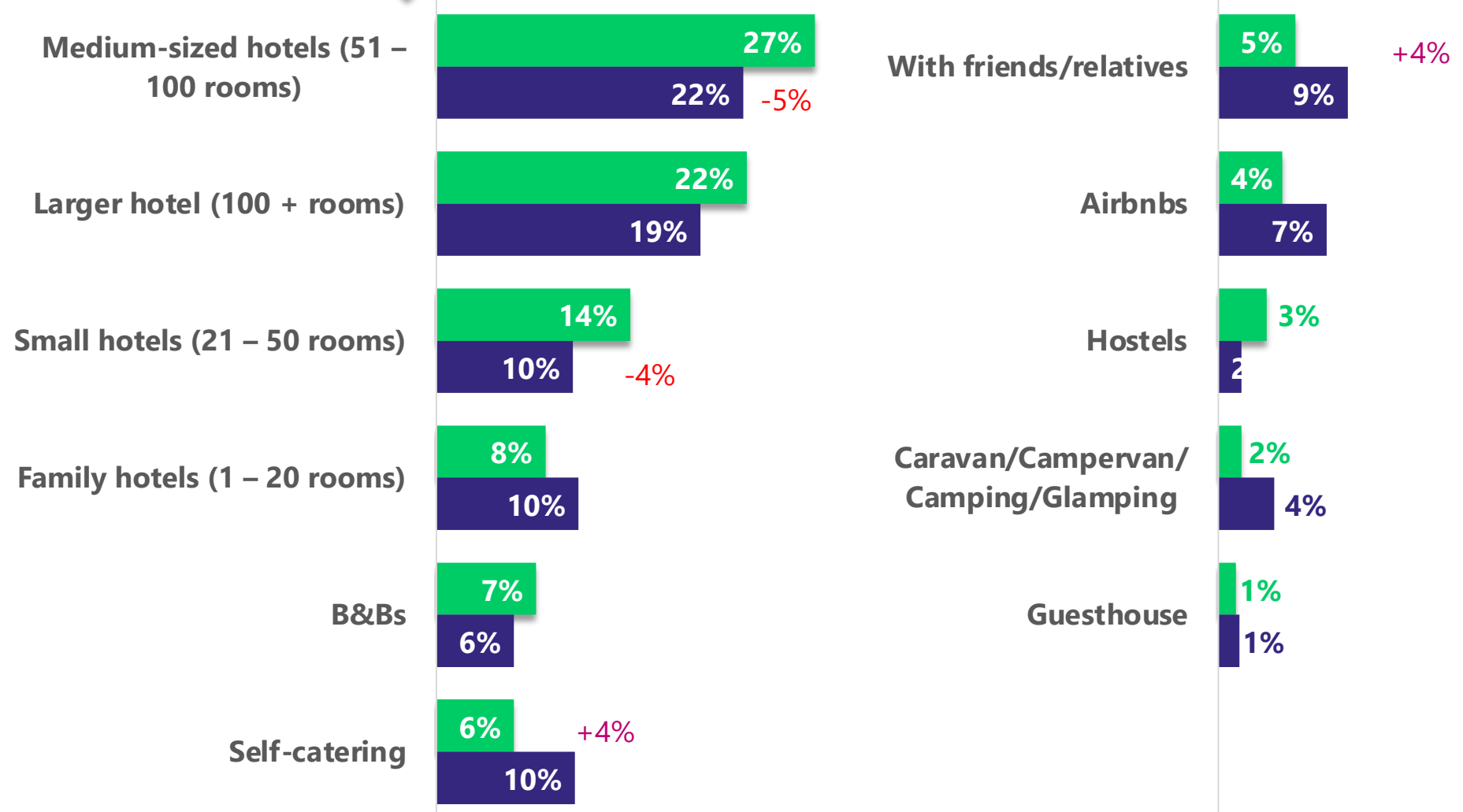
*\*slight change to the wording of the question*

Q6b. Which of the following contribute to you being 'not very confident' or 'not at all confident' about taking a short break or holiday on the island of Ireland over the next few months?

# Hotels must communicate the safety measures to maintain their market share – take inspo from family hotel/self-catering approach

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

█ Normally stay in  
█ Feel most safe



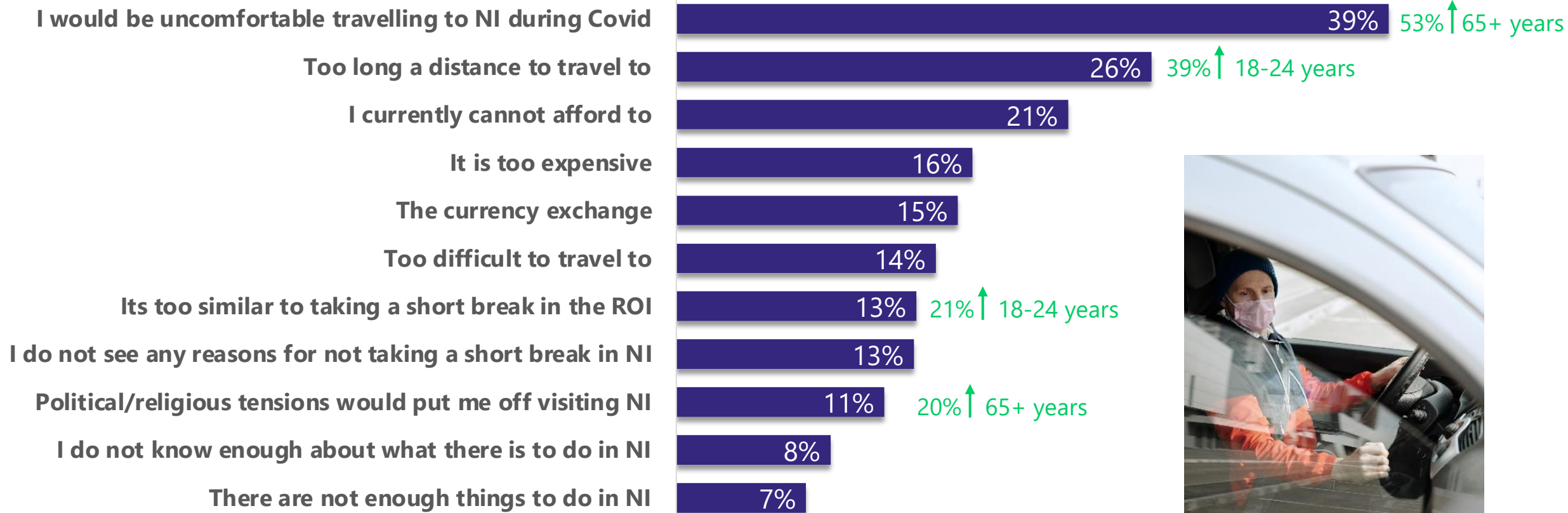
N = 752



# Drivers & Perceptions of a Domestic Holiday



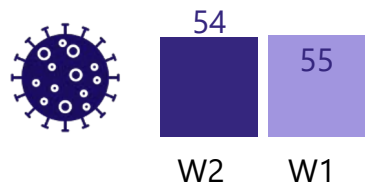
# Covid-19 key barrier – Targeted comms to younger groups highlighting ease of travelling to NI & variety things to do in NI



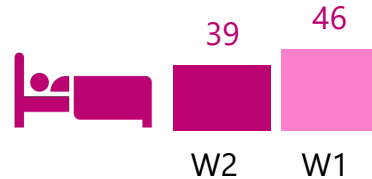
Base n = 752

# Safety and security still remains the key consideration – all other factors becoming less important

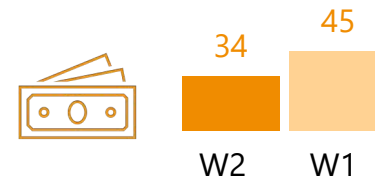
## Short Break in Northern Ireland – Key Considerations



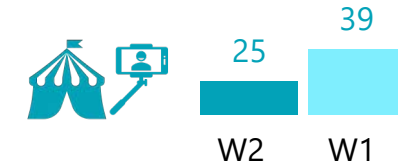
**Safety & security specifically related to Covid-19**



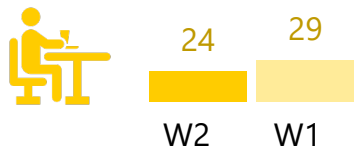
**Accommodation costs**



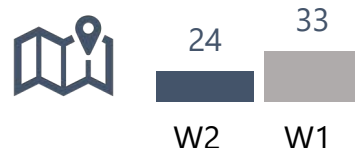
**Value for money in the destination**



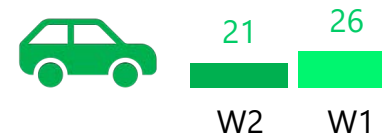
**Attractions to visit in the area**



**Availability of options for eating in / out**



**Ease of travelling/distance to destination**



**Ease of travelling within destination**



**Accommodation choices**



# Building itineraries of scenic walks and outdoor sightseeing will help in bolstering interest

Top activities they would be interested in if taking a short break in NI

## Walks



Beach 42%

Forest Trail 38%

Mountain Hike 19%

## Outdoor Attractions



Nature Reserve/parks 38%

City Sightseeing 38%

Zoo/Petting Farm 19%

Farmers Market 16%

Drive-in Cinema 13%

# Interest in visiting historic houses/gardens is high relative to other indoor attractions – something to showcase

Top activities they would be interested in if taking a short break in NI

## Other Outdoor Exercise



Adventure Park 14%

Swimming 11%

Cycling 10%

Outdoor Sports 10%

## Indoor Attractions



Historic House/Garden 35%

Museum/Gallery 26%

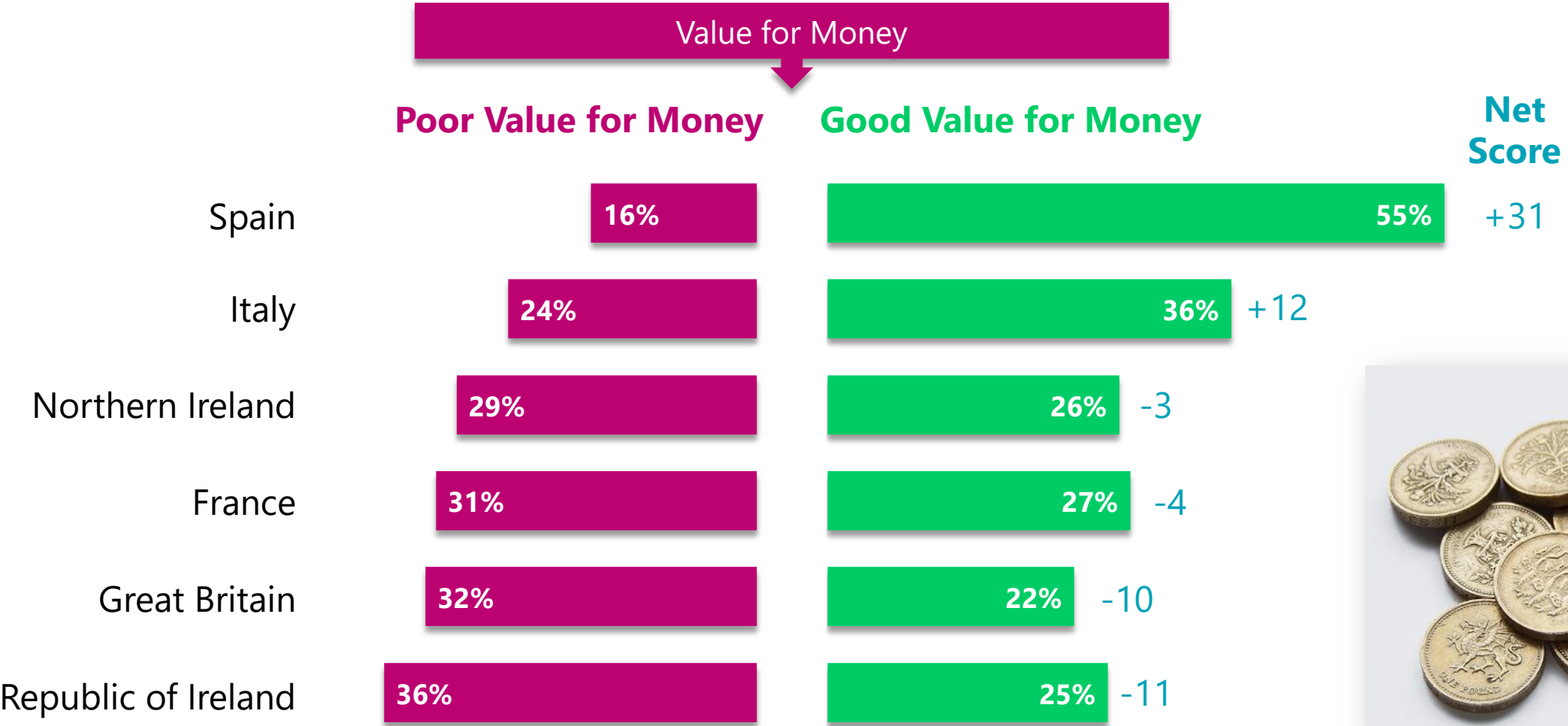
Spa/Relaxation experience 21%

Tours 17%

Xmas Hotel Experience 16%

Visitor Centre 13%

# Northern Ireland's net VFM score higher than ROI – opportunity to highlight the value in NI with targeted comms



N = 752



# Travel Intentions





# Almost 4 in 5 breaks in NI were cancelled – ease of rescheduling process important going forward

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

In Northern Ireland

28%



**77%** of breaks in Northern Ireland were cancelled

Of those who cancelled...

**35%** did not reschedule their break in Northern Ireland

**65%** rescheduled their break for this year or next year

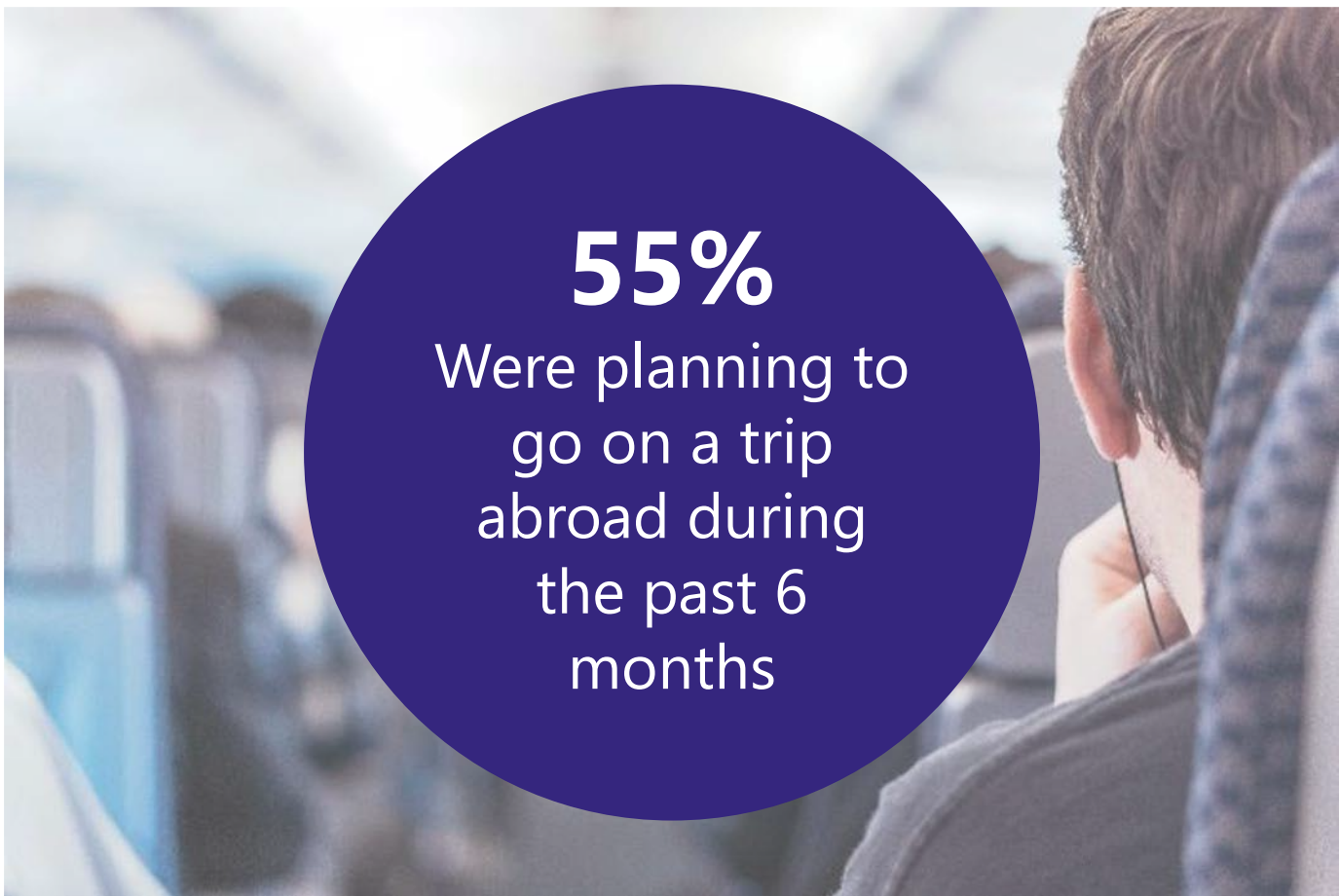
In the Republic of Ireland

57%

Abroad

55%

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



**86%** of these breaks abroad were cancelled due to Covid-19



# Many cancelling trips abroad took breaks in ROI instead – Opportunity to divert some of these to NI by dialling up VFM



**51%** of cancelled trips abroad were not rescheduled

Those who cancelled their holiday abroad = 356

While **16%** of those who cancelled their trip decided to **take a break in ROI instead**

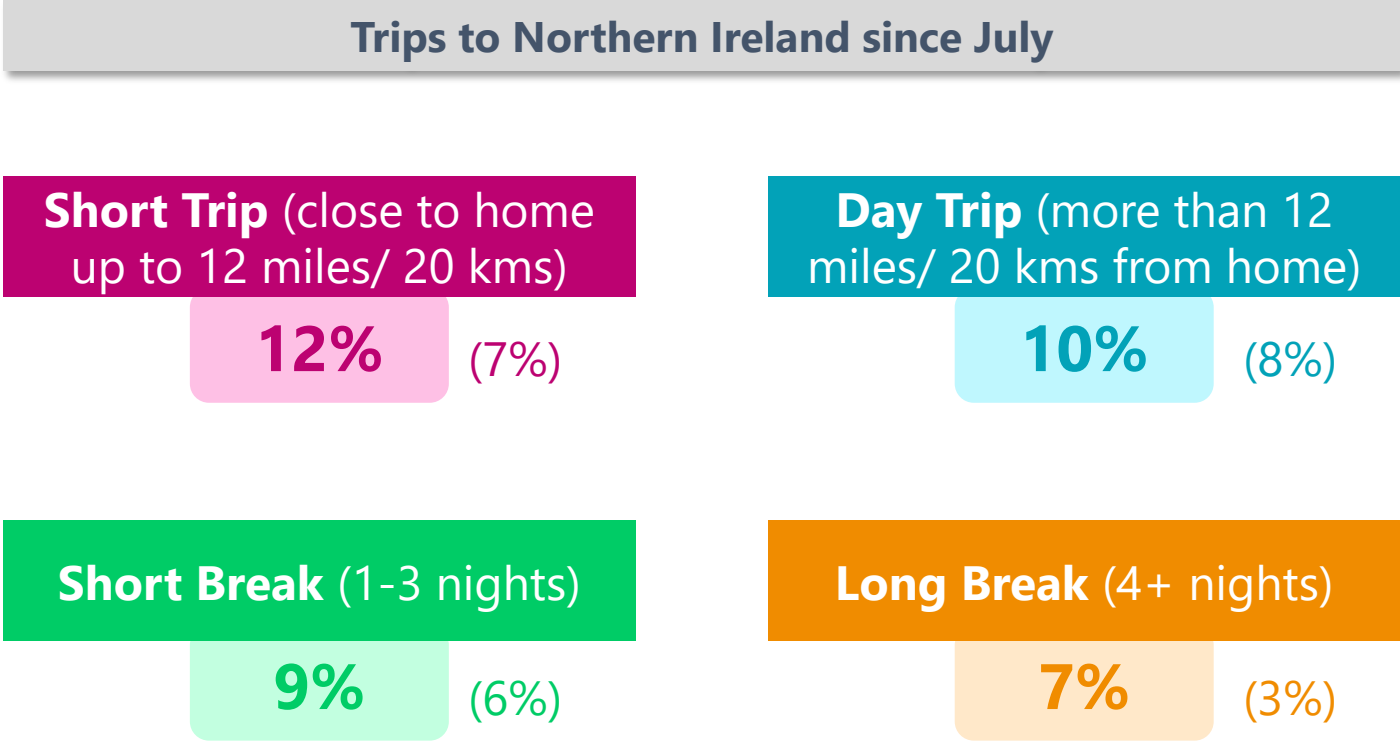
Those who cancelled their holiday abroad = 356

Just **1%** went to NI instead

Those who cancelled their holiday abroad = 356

# Number of trips increases across types but majority still short/day trips – **opportunity to encourage more overnight stays**

**23%**  
Have taken some sort of holiday in NI since July  
Wave 1 = 18%



Wave 1 = ()



# Continuing to **dial up breadth of activities & provide itineraries** to persuade more to stay overnight – safety also still key

## What would encourage you to stay overnight?



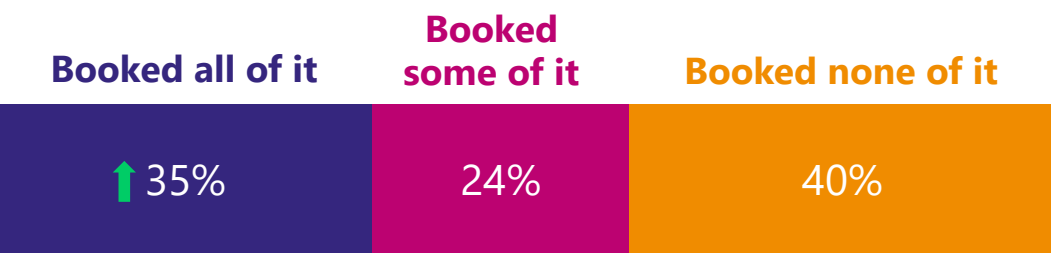
*\*(e.g. stay 2 nights and get a free evening meal, free access to certain attractions if staying overnight, stay 3 nights for the price of 2 etc.)*

# Vote of confidence as number who have booked all of their short break jumps significantly – majority waiting until new year to travel



How much of your short trip have you planned?

N = 99



N = 752

**13%** intend to take a short break in Northern Ireland  
Wave 1: 13%

Wave 1 figures:

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

N = 99



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

# Long breaks also see an uptick in bookings although majority planned for the spring

N = 752

**9%** intend to take a **longer** break to Northern Ireland  
*Wave 1: 6%*

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

N = 69

(caution low base size)



Wave 1 figures:

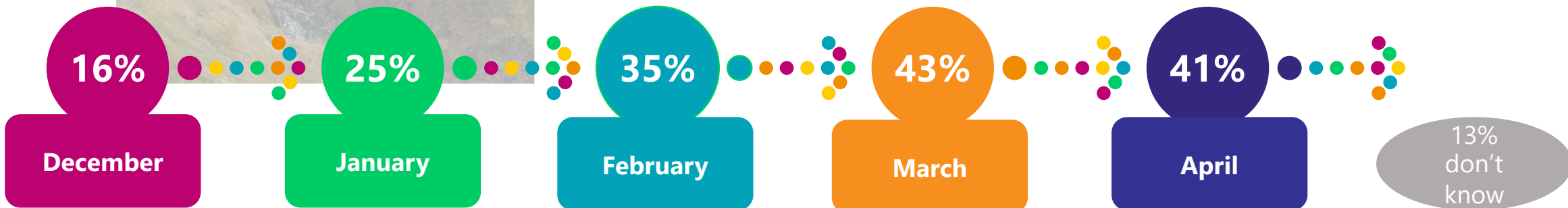
34%

24%

42%

N = 69  
 (caution low base size)

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



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

# Exclusive package deals including options to cancel key to triggering booking

## What would encourage you to book sooner?

Those who plan to travel to NI but have not fully booked



*\*(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.)*



# The desire for escapism & relaxation starting to lessen – Important to dial up the fun to be had in NI

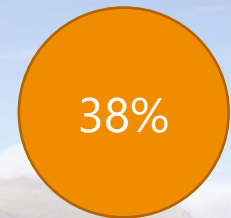
## Motivations for longer / short breaks (combined)



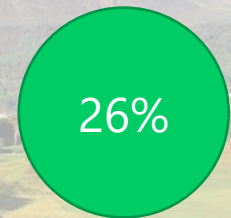
## Preferred type of holiday

N = 69  
(caution low base size)

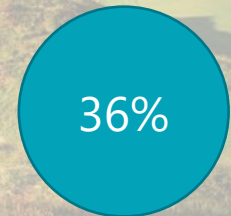
A more exciting holiday full of activities and sightseeing



A bit of both



A more laid-back, low-key and relaxing holiday



■ Wave 2

■ Wave 1

N = All those who intend on taking a short or long trip – 168

# Some still looking to stay overnight in NI for Christmas Shopping with Belfast being the top destination

28%

have taken an overnight stay for Christmas shopping in NI in the past

While

15%

likely to **stay overnight** in NI this December

18%

likely to take a **day trip** for Christmas shopping

N = 752

## Top Shopping Destinations for Overnights

Base n = 112

49% Belfast

26% Derry/Londonderry

21% Omagh

21% Lisburn

21% Ballymena

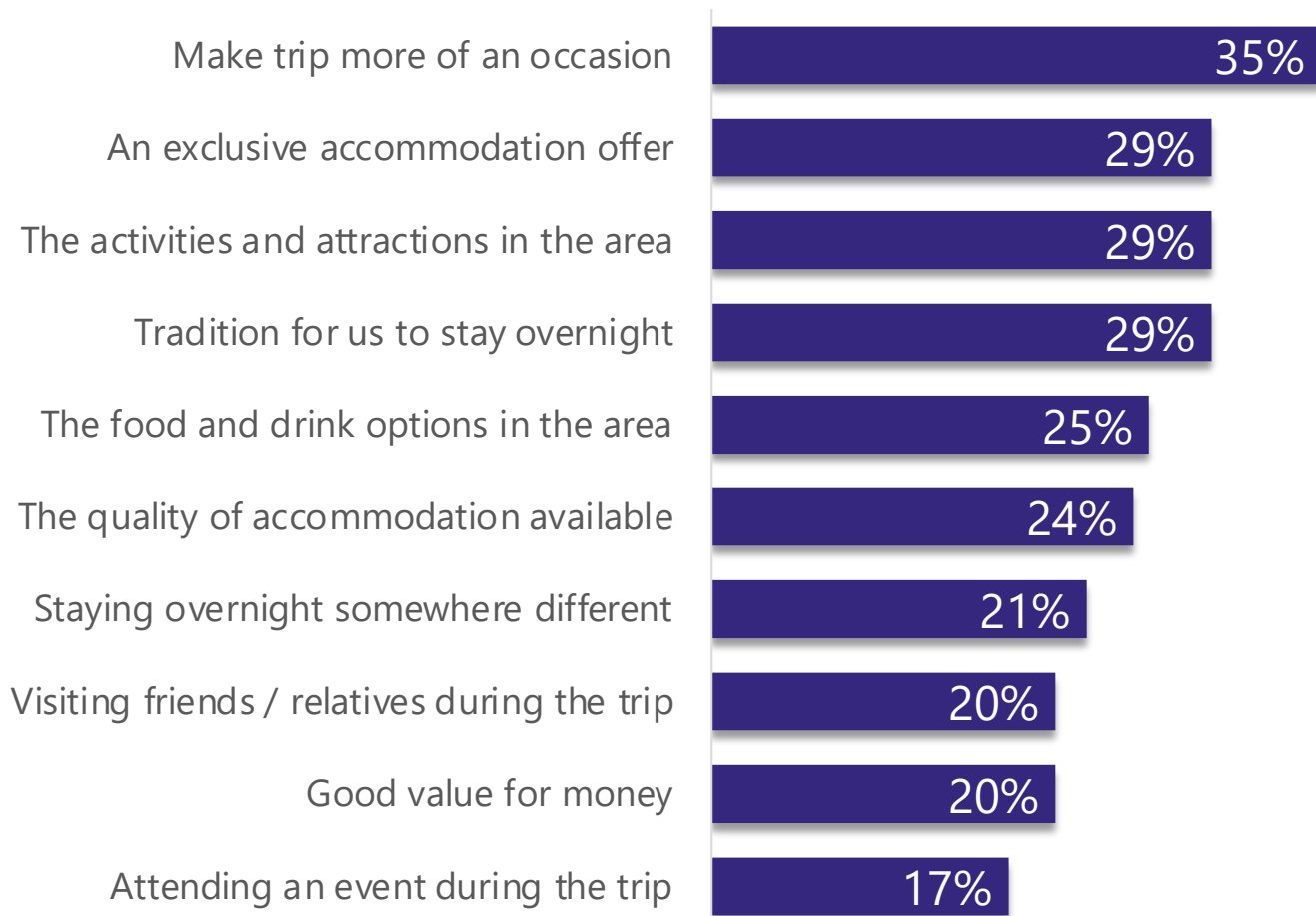
17% Craigavon

15% Newry



# Just 1 in 5 taking value for money into account when taking a shopping trip to NI – **need to make sure this is top of mind**

## Main reasons for taking an overnight shopping trip to NI



# Variety of things to do strongly conveyed and also performs better than OOH at showing NI as **fun and exciting**

## Advertising Key Messages



Base n = 752