Consumer Sentiment
ROI Market

October 2022 Report

tourism northernireland

SPARK
The Strategic Insight Agency

Research Background

Research background & objectives

This is the 9th wave of consumer sentiment research in the Republic of Ireland market. We have continued to monitor consumer attitudes towards travel to NI and elsewhere, keeping an eye on how current issues, e.g. cost of living, have impacted on consumer behaviour and intentions.

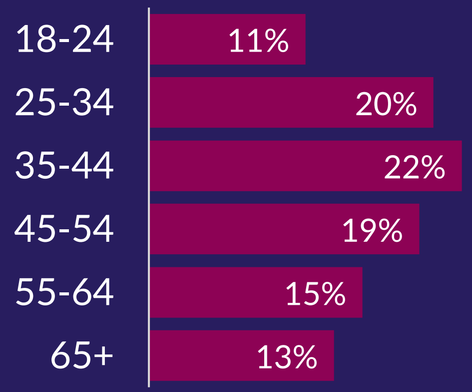
The research objectives:

- Continue to track consumer sentiment towards Covid and explore current attitudes to travel
- Explore perceptions relating to value for money, cost of living increases and attitudes to events
- Understand recent travel experiences in NI
- Assess travel intentions for the remainder of the year and into 2023

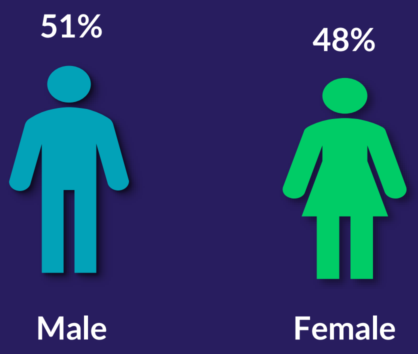
Sample - We spoke to a robust, nationally representative sample in the Republic of Ireland

Full sample n=760

Age

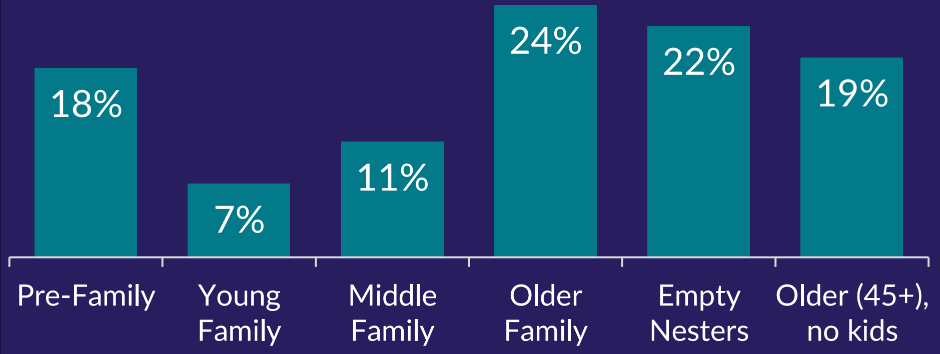


Gender

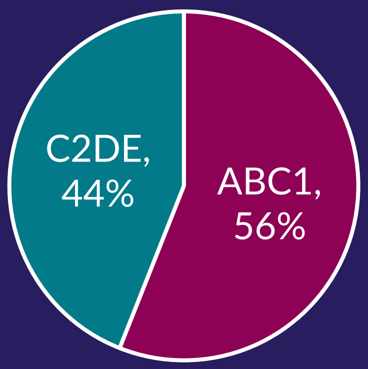


1% describe in another way

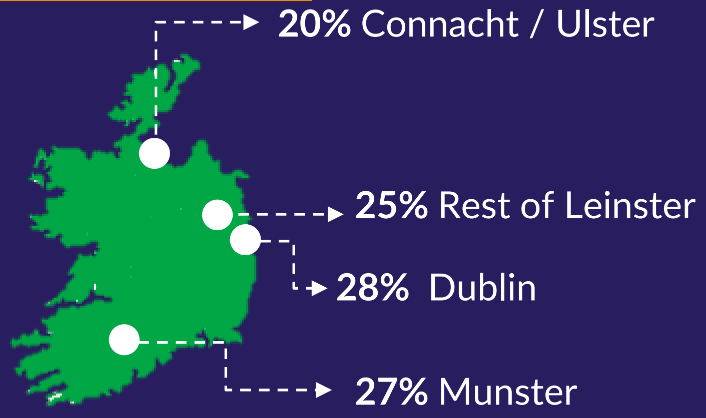
Lifestage



Socio



Region



Key takeaways

Most people are now in a post-Covid mentality

- Lower stress / anxiety levels – 38% now not feeling stressed at all about Covid, up from 24%.
- And crucially we have seen a sea change in terms of comfort with outdoor and indoor activities and events. 42% were comfortable with going to pubs and bars in March – that has grown to 66% - demonstrating a sense of "normality".

Positive indications for continued strong performance in 2022

- Results point to continued high levels of ROI visitor volumes in 2022, with the majority of visitors noting an overall positive experience.
- 1 in 6 in ROI consumers have visited Northern Ireland for a short or long break this year. Over half of these were first time visitors to Northern Ireland.

But cost of living impacts are being felt

- 50% said they expect to be significantly negatively affected by cost of living impacts in the coming months – up 9% vs. March 2022.
- This translates into a desire to spend less on most luxuries, including holidays, but at this point in time only a minority intend to forego their holiday at home or abroad.
- Value for money perceptions of NI have declined but remain ahead of ROI.

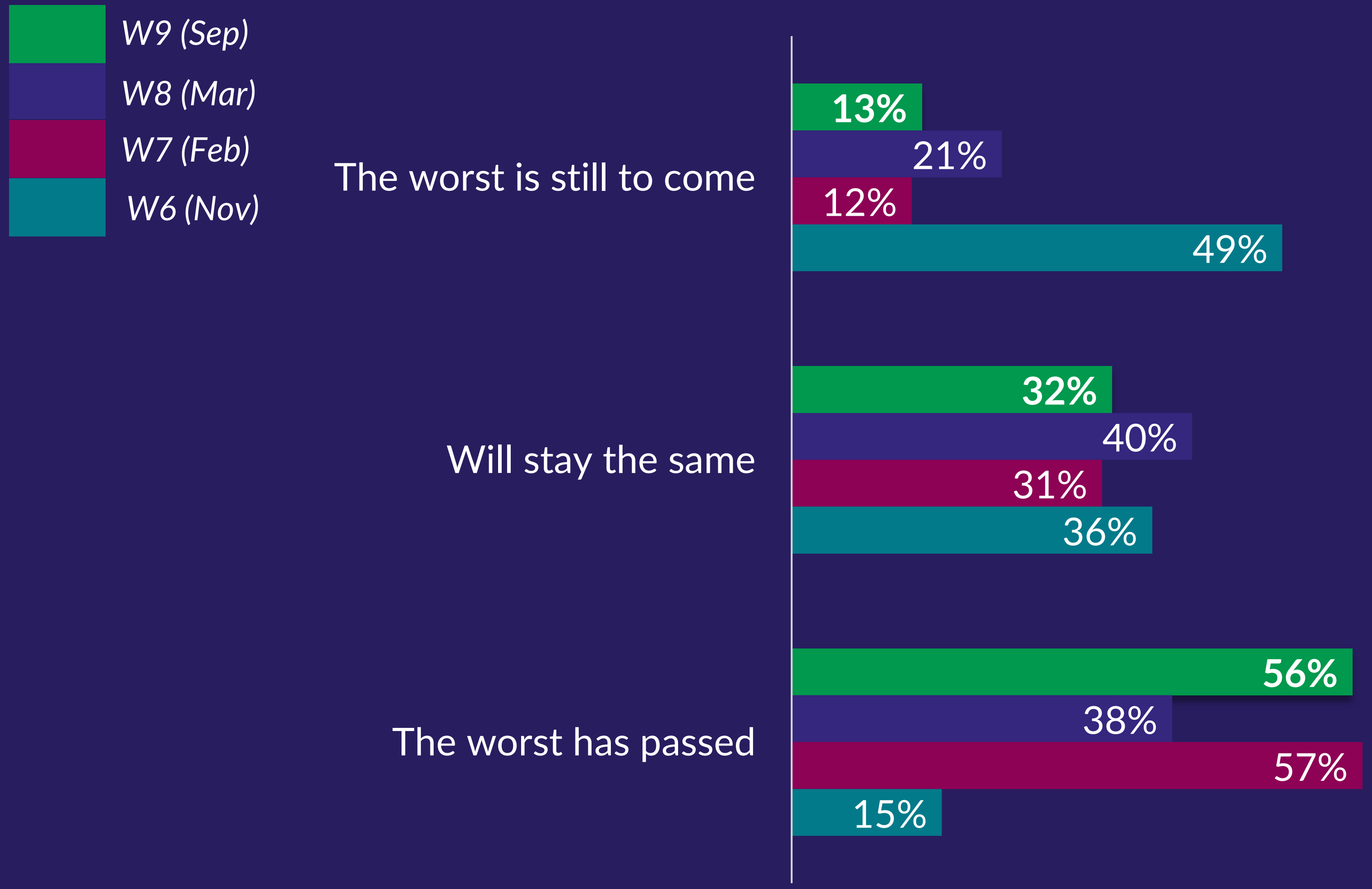
Travel intentions remain stable for NI

- Day trip and short break intentions are steady for the remainder of 2022 and for the early months of 2023.
- Increased market competition is also evident however, with significant increases in the proportion of ROI visitors considering taking a break abroad in the next six months.
- ROI staycation consideration also remains strong.

COVID-19 and Tourism

Covid outlook for next month – positive to see a majority now think the worst has passed and things will continue to improve

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



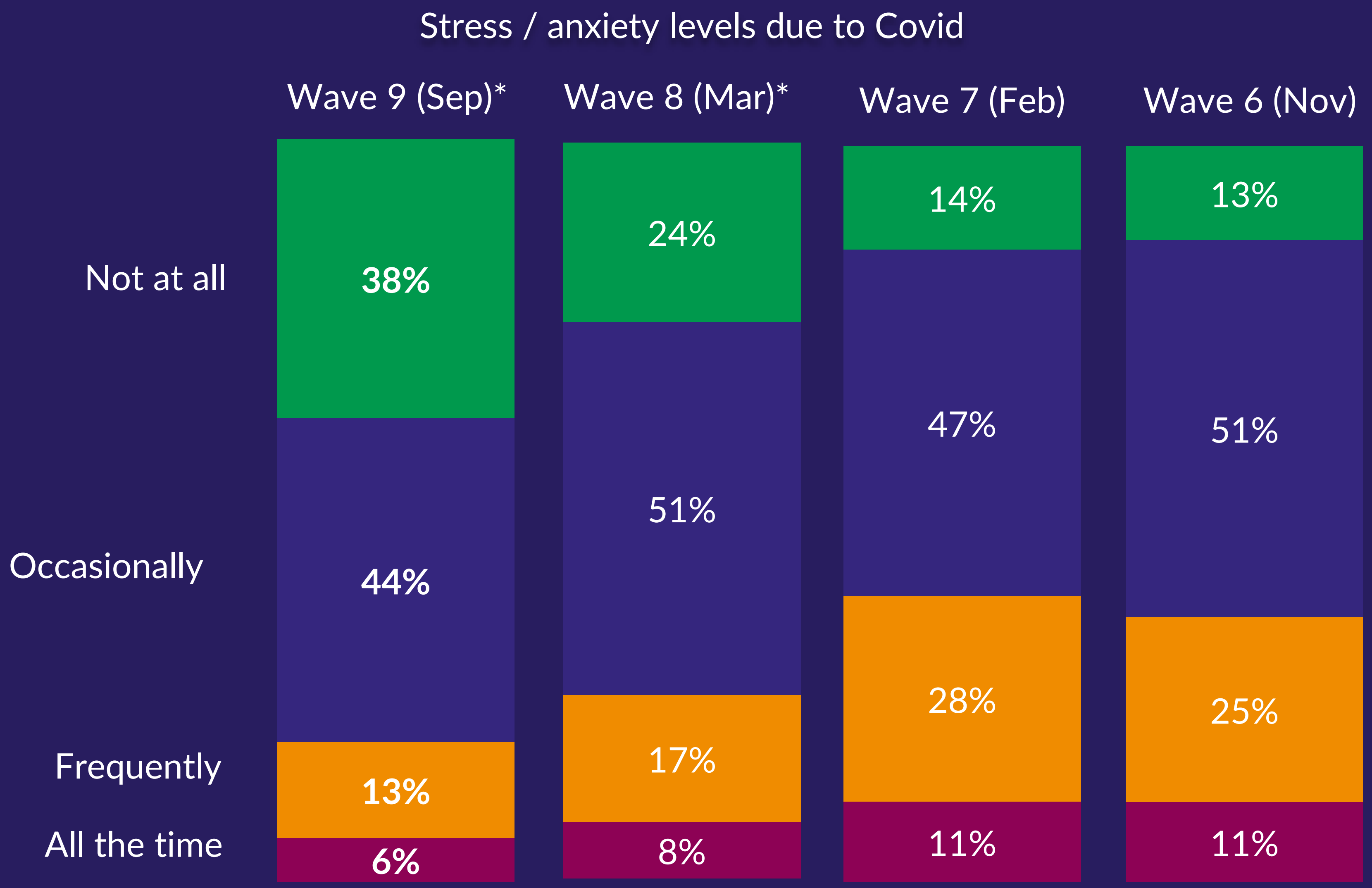
More negative outlook among **mid-family** (19%) and **older, no kids** (18%)

More positive outlook among **pre-family** (62%)

Base n = 760

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

Stress / anxiety levels relating to Covid have dropped significantly



Female participants most likely to report being anxious frequently / all the time (**22%**); also **C2DE** (**24%**)

* *NB question changed slightly from March research. Now reflects stress 'due to Covid' over the past month rather than 'during Covid'*

Base n= 760

A1b. How would you describe your stress and anxiety levels due to Covid-19 in the last month?

Market comparison – Covid-19 and tourism

Significant reduction in anxiety in both markets

- **56%** say the worst has passed in ROI; **58%** in NI – in both cases a significant increase.

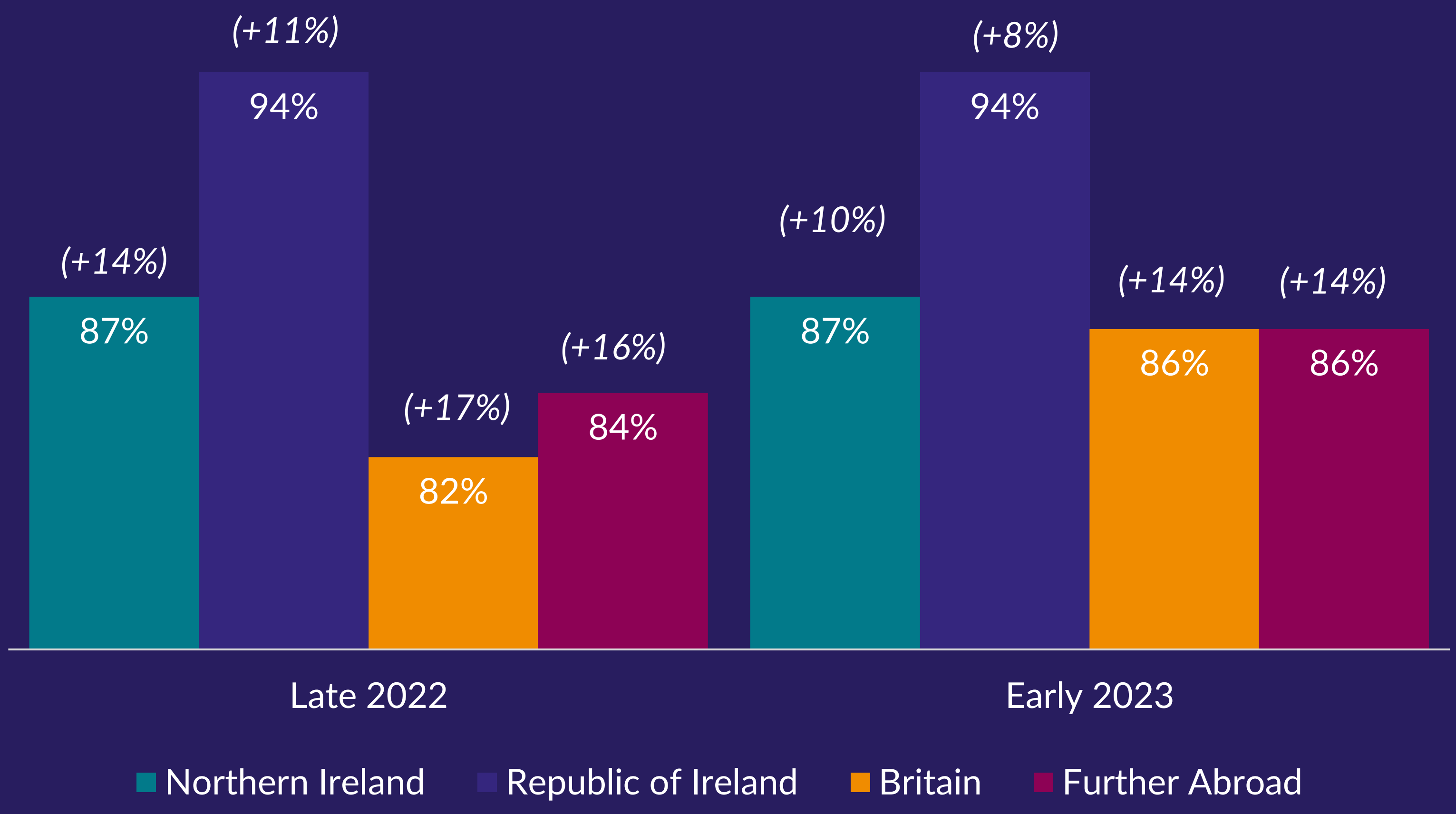
And most are not generally feeling anxious about Covid

- **82%** say they have been anxious about Covid either 'not at all' or 'occasionally' in ROI; **83%** in NI.
- The figures for both questions are very similar for the two markets – both with a similarly positive outlook at present.

Current attitudes towards tourism

Almost universal sense of safety if staying on the Island of Ireland for a break now – trips abroad not far behind either. Returned sense of normality about holidays.

How safe would it be to go on holiday in… (scores vs. March ’22)



Base n = 760

B1. How safe do you think it would be to take a holiday or short break in each of the following locations in the remainder of 2022 (September – December 2022)? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations in early 2023 (i.e. January – April 2023)?

High numbers feeling comfortable that a holiday would not be cancelled, although still 1 in 4 not confident of this

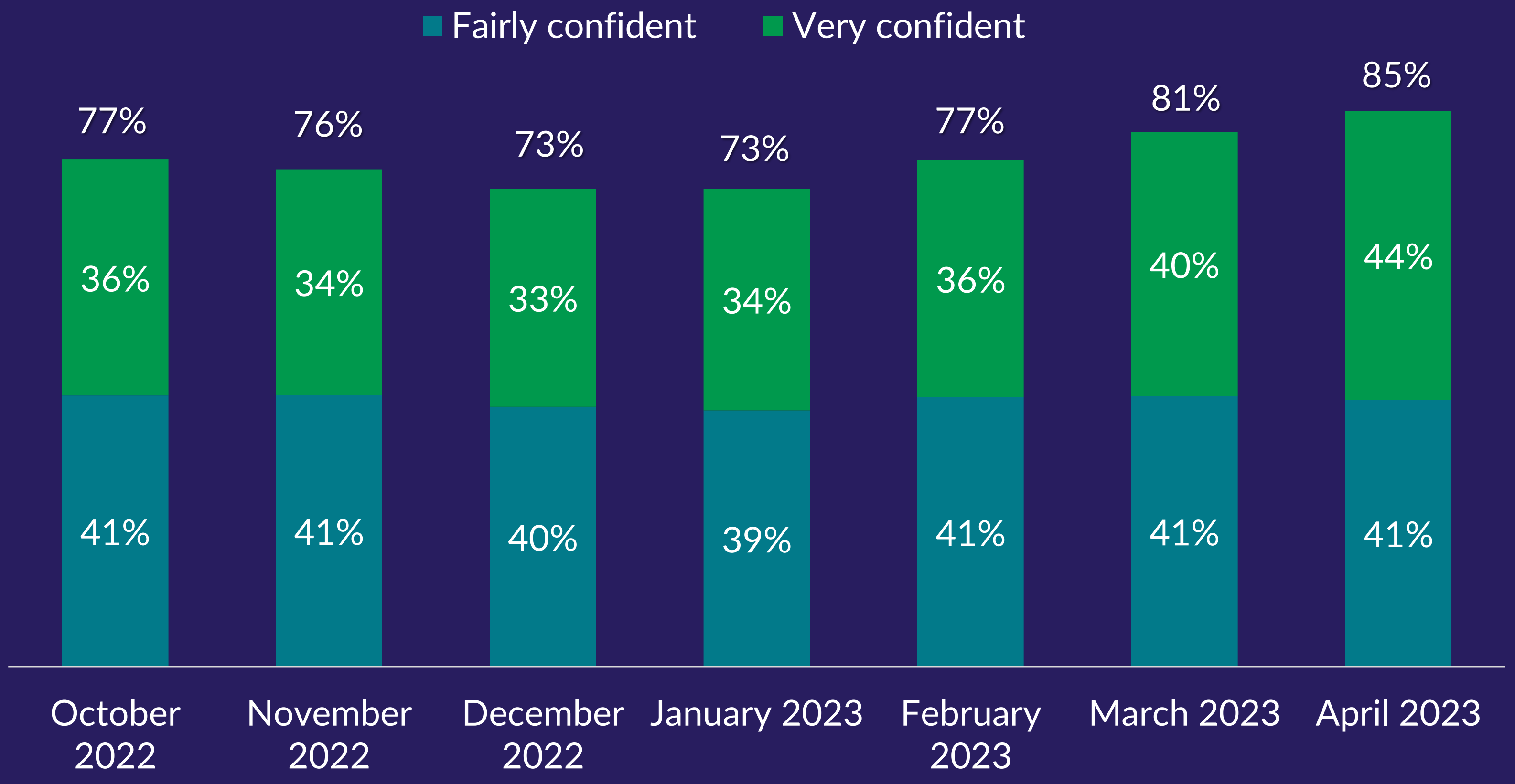
77%

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

W8 (Mar): 65%
W7 (Feb): 64%

Confidence lower in particular with those who are older with no kids (29%)

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

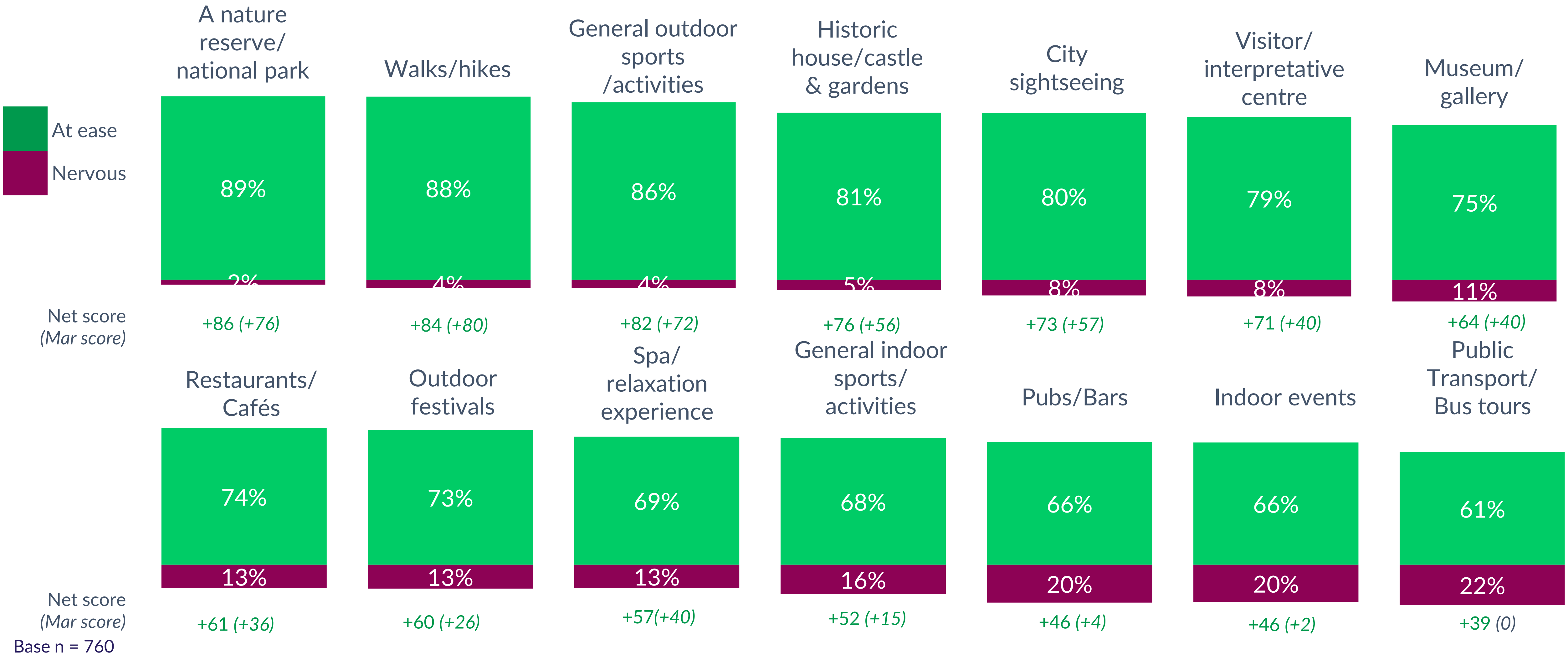


Base n = 760

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)?

Positive sea change in levels of comfort with indoor activities vs. earlier this year (esp. pubs, events), with majority now comfortable with all types of activities tested

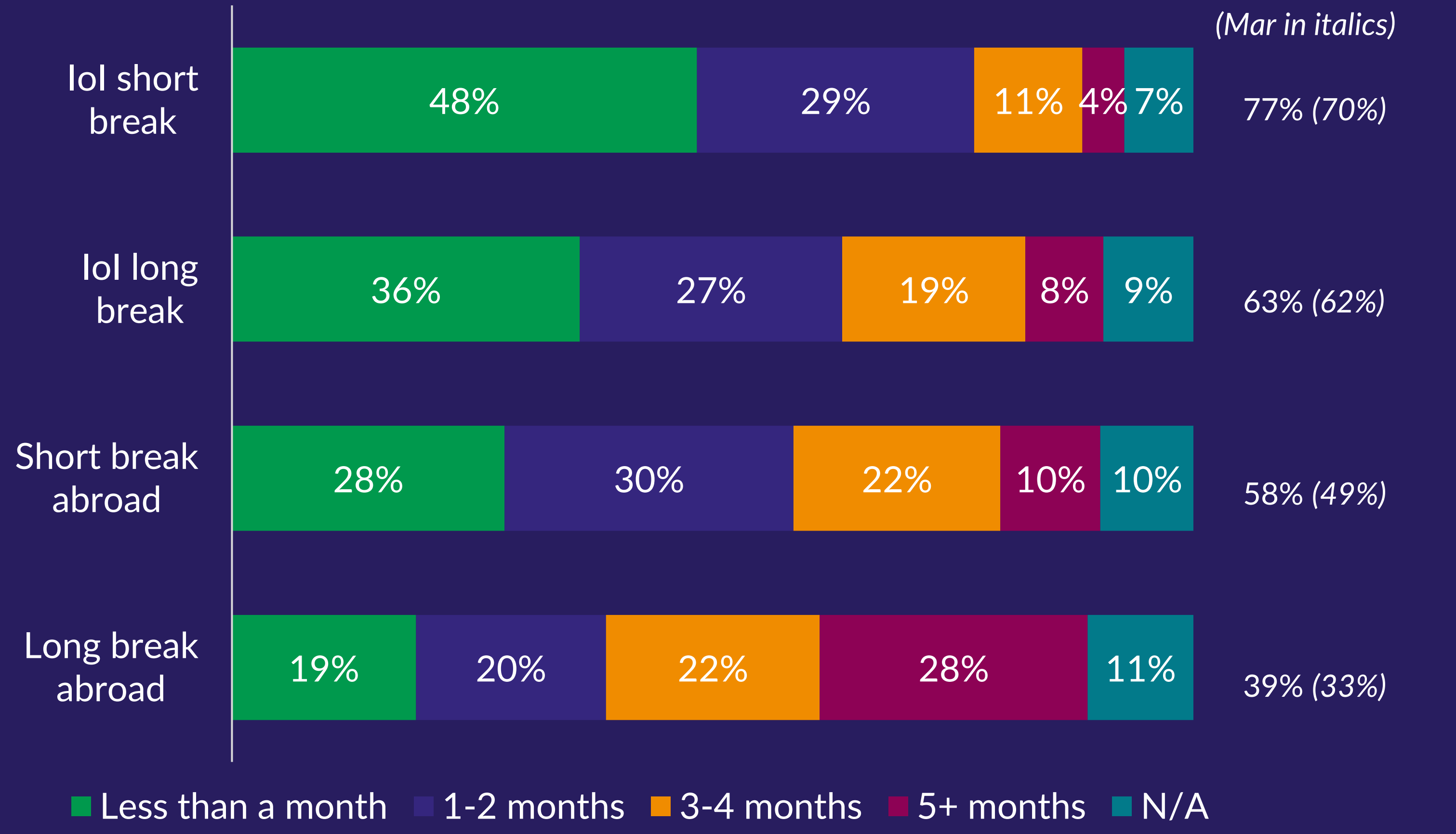
Ease in engaging with activities over the remainder of 2022



B4. How do you currently feel about engaging in these activities over the remainder of 2022?

More now looking at booking holidays slightly closer to date of travel

How long they'd book holidays before date of travel (looking up until April 2023)



Base n = 760

B6eNew. 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 the remainder of the year and early 2023 (October 2022 – April 2023)?

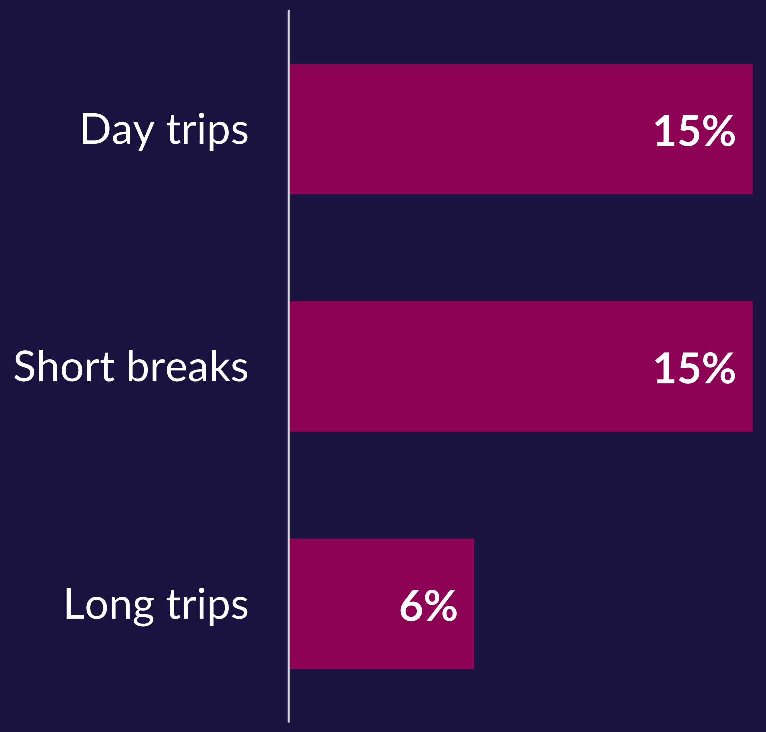
Travel Experiences

1 in 6 in ROI have visited Northern Ireland for a short or long break this year

17% have taken a **short or long break** in NI in 2022

53% said they were first time visitors

% of total sample who took...



Other than NI...

52% took a break in ROI

36% went abroad

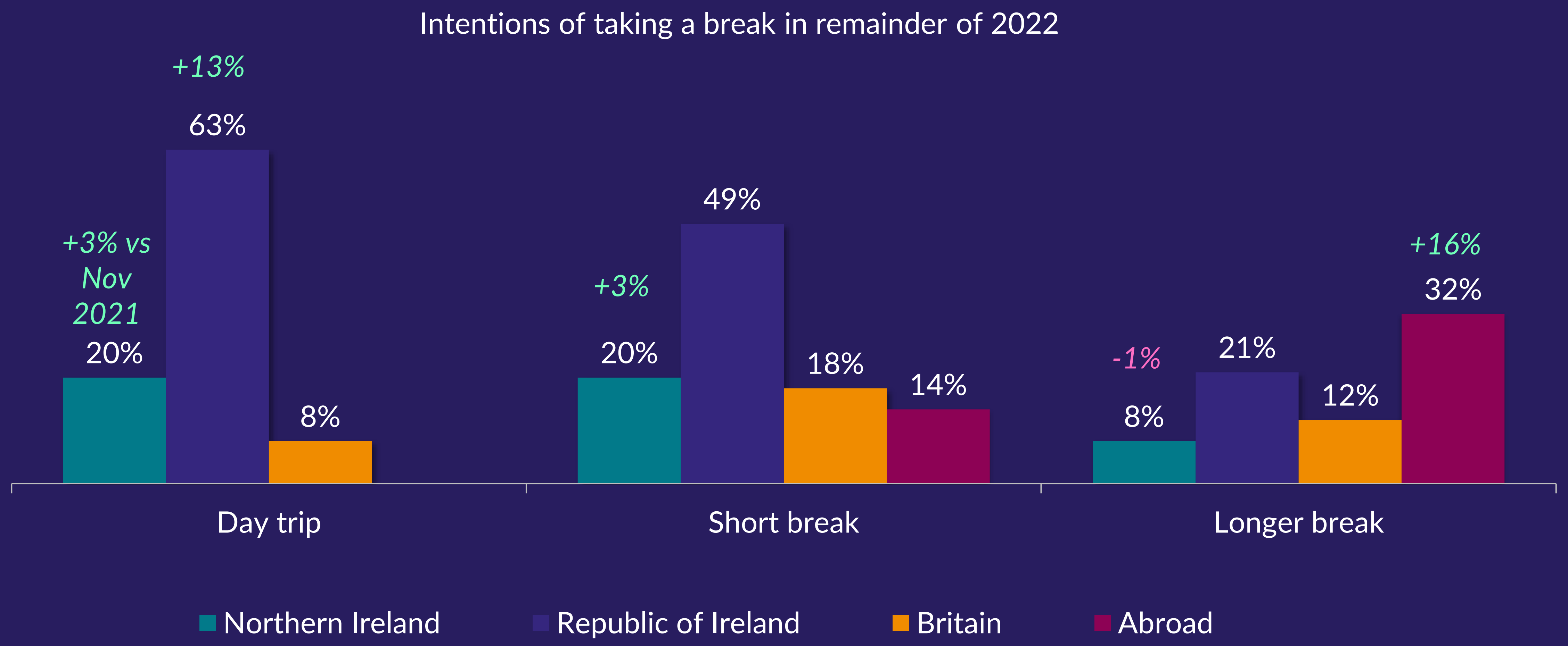
26% didn't travel at all

N = 760

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 2022?

Travel Intent

Break intentions up slightly for day / short trips vs. Nov 2021, but down slightly for long breaks, whereas **long trip abroad intentions are up**



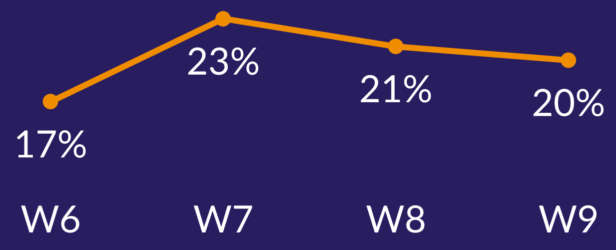
Base = 760

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 remainder of 2022 (September to December)?

Short break plans are stable for NI

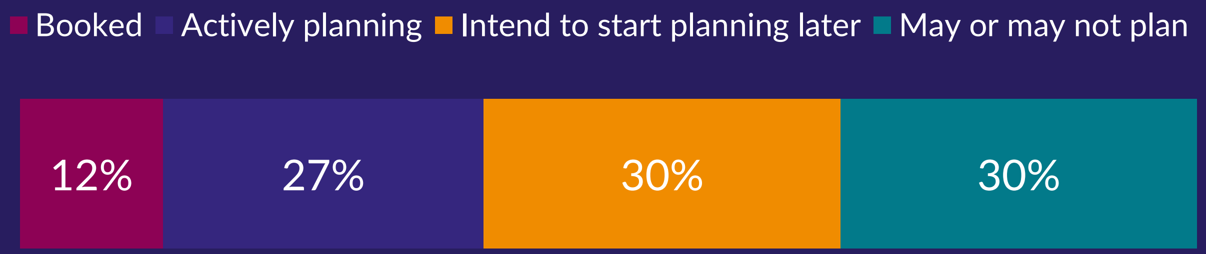
20%

are considering a **short break** in NI in late 2022



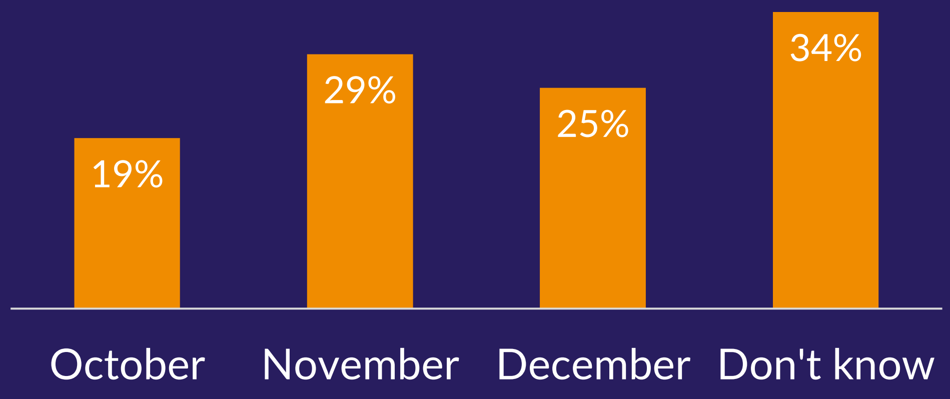
Base = 760 / 152 planning short break

Amount of short break planned



39% are actively planning or have booked a trip to NI – **8%** of the total sample

Short break planned for

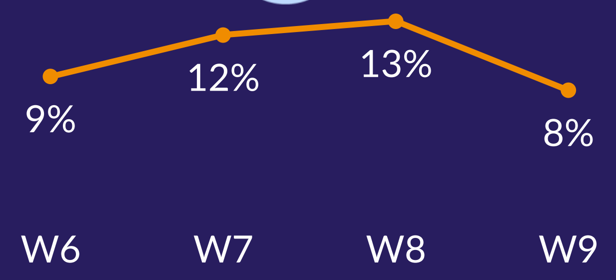


E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the remainder of 2022? / E2. Which specific month, if any, did you have in mind for your break(s) in Northern Ireland/ E3. Have you booked or thought about planning this trip in Northern Ireland?

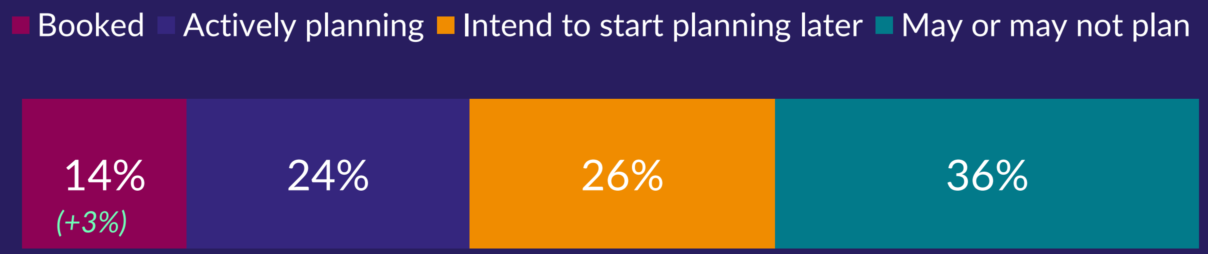
Long break plans dip somewhat, although may be reflective of the time of year

8%

are considering a **long break** in NI in late 2022

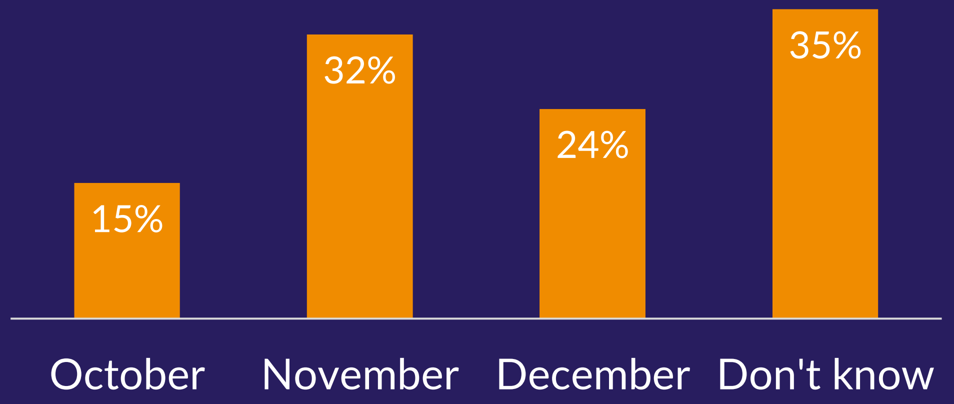


Amount of long break planned



39% are actively planning or have booked a trip to NI – **3%** of the total sample

Long break planned for

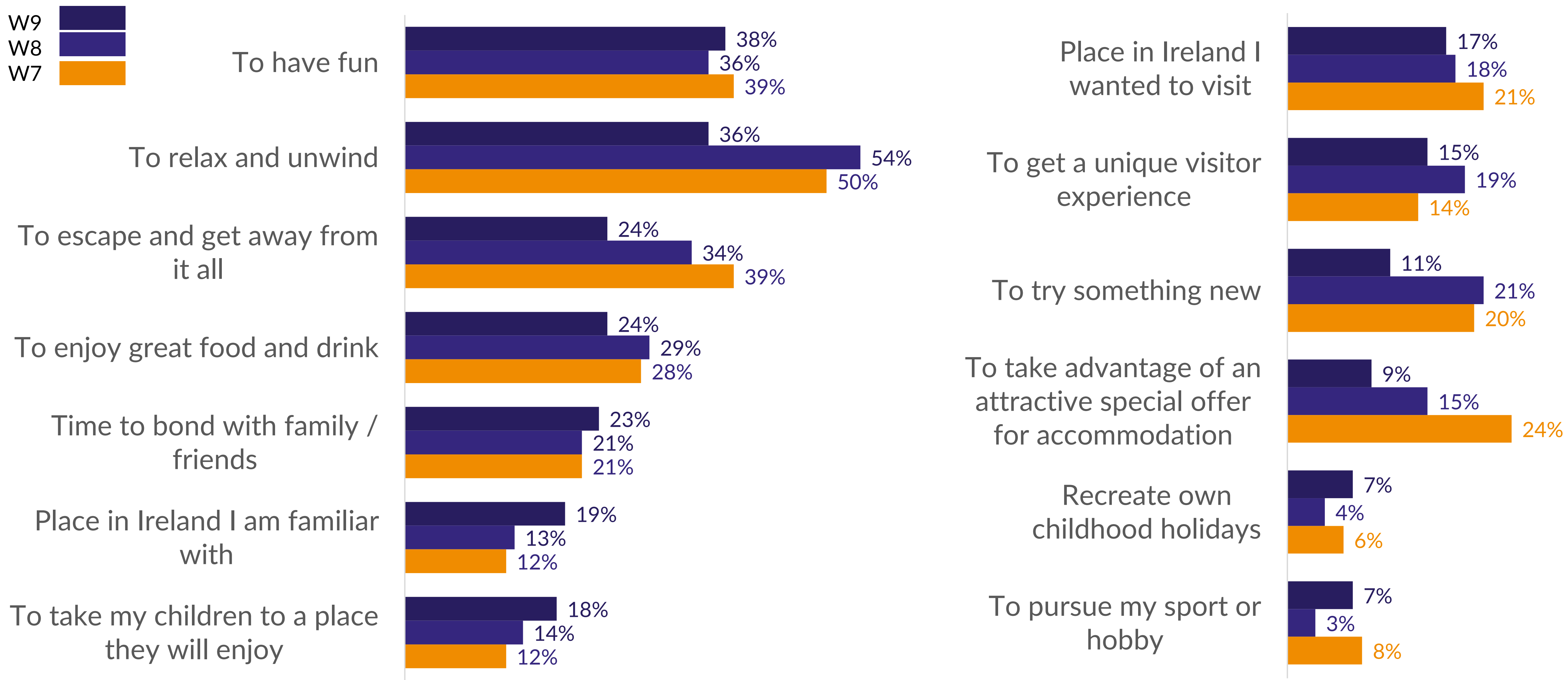


Base = 760 / 54 planning long break

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the remainder of 2022? / 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?

Fun now top motivation for trips to NI – ahead of relaxation and escapism

Trip motivations (long and short combined)

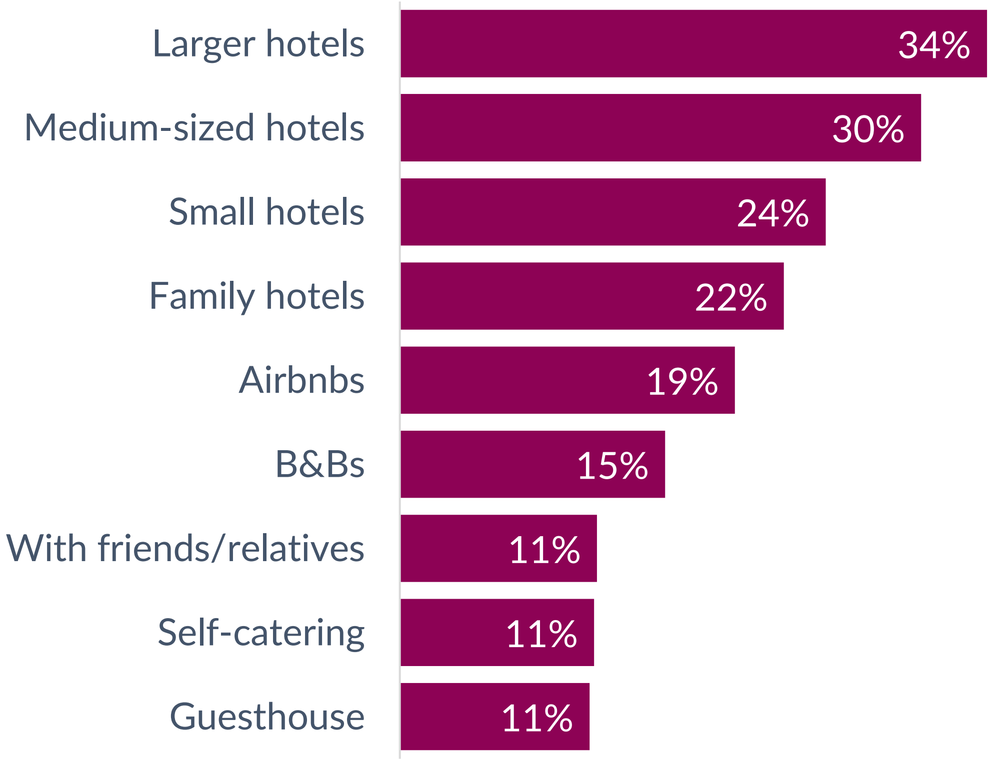


Base = 117

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

Consumer preference for hotels remain strong. Similarly there is an increase in numbers looking for excitement on holidays

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



Trend towards larger hotels (+10%) and away from medium hotels (-18%). Also trend towards exciting holidays (+7%) and away from laid back ones (-10%)

Who travelling with (long & short combined)

- 40% Partner / spouse
- 40% Immediate family
- 20% Friends

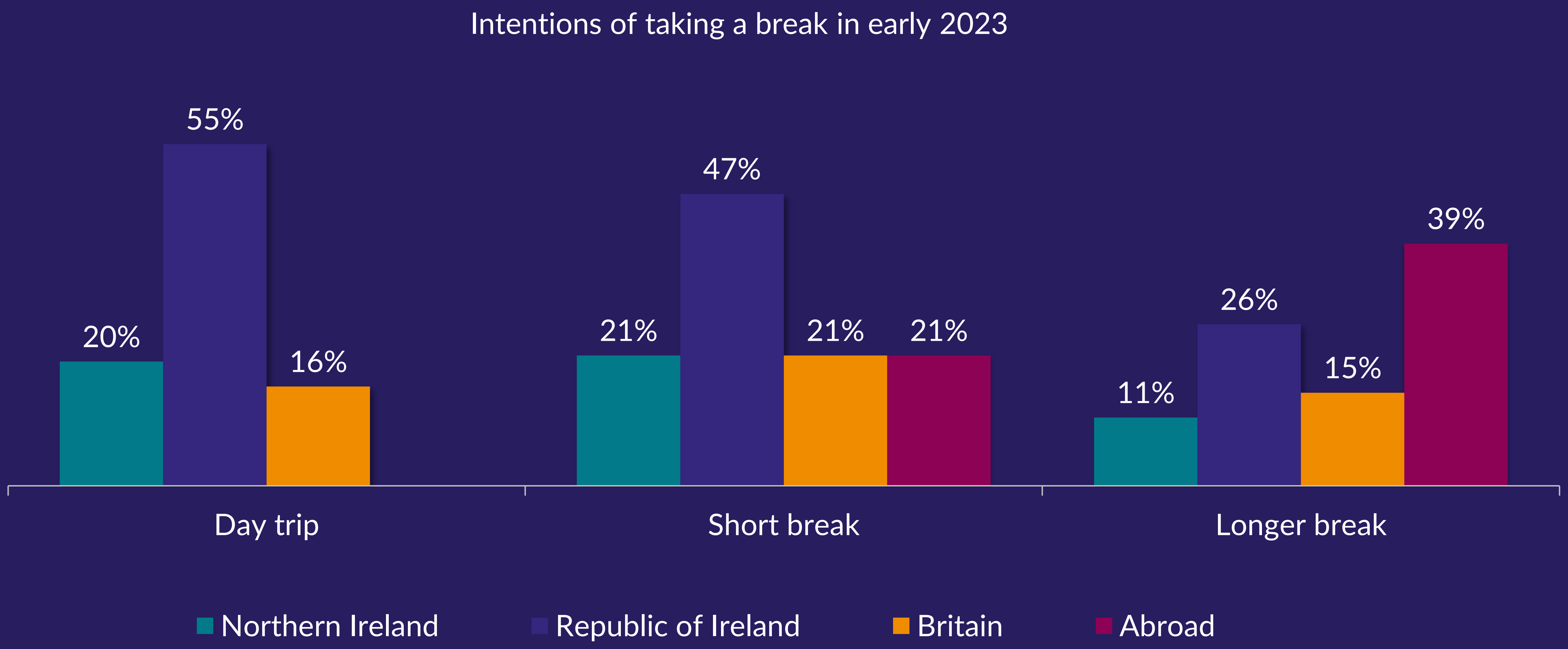
Type of trip preferred

- 45% Laid back holiday — *-10% vs. Mar*
- 16% Exciting holiday — *+7%*
- 39% A bit of both — *+3%*

Base = 117

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? /E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer?

For **early 2023** roughly 1 in 5 planning short breaks and 1 in 10 planning long breaks – long break abroad intentions are strong



Base = 760

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 early 2023 (January – April?)

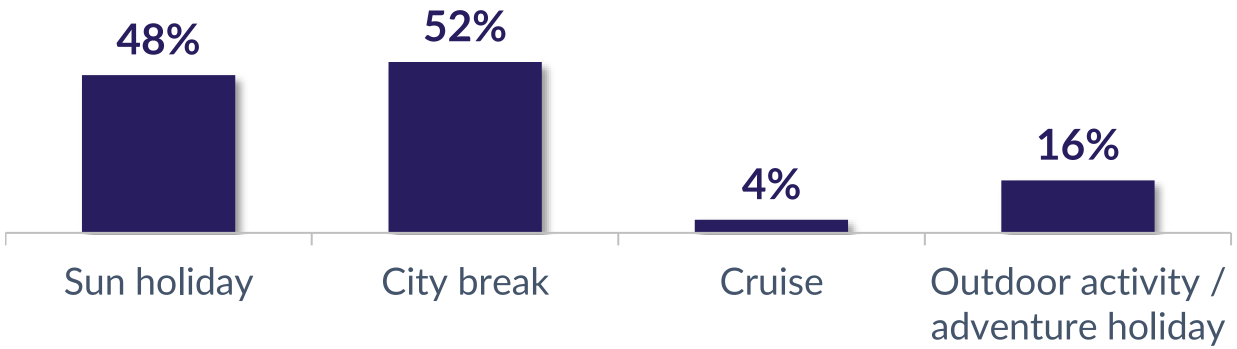
Half are considering some sort of trip abroad in next 6 months. Weather is a strong factor for going abroad and city breaks are growing in popularity

51% of total sample are considering a break abroad in late 2022 / early 2023

53% of this cohort are actively planning or have booked their trips

Trip intentions have grown although not as drastically as in previous waves. Number actively planning or booked has also dropped by 13%

What type of trip are you considering?

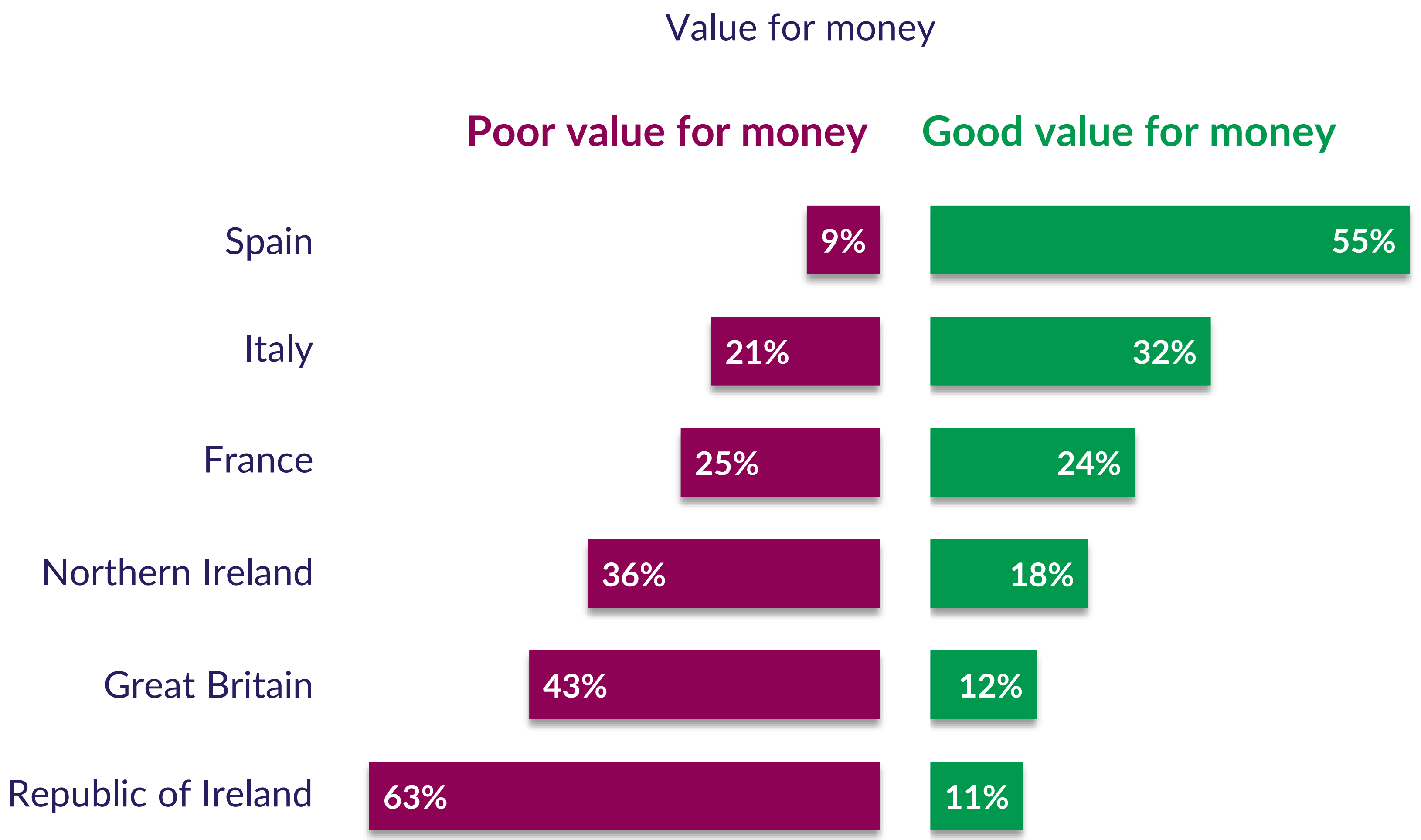


Base = 390 considering trip abroad

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?

Value for money / Cost of living

Value for money perceptions down significantly for holidays in the UK and Island of Ireland whereas perceptions for trips abroad less affected



Net Score

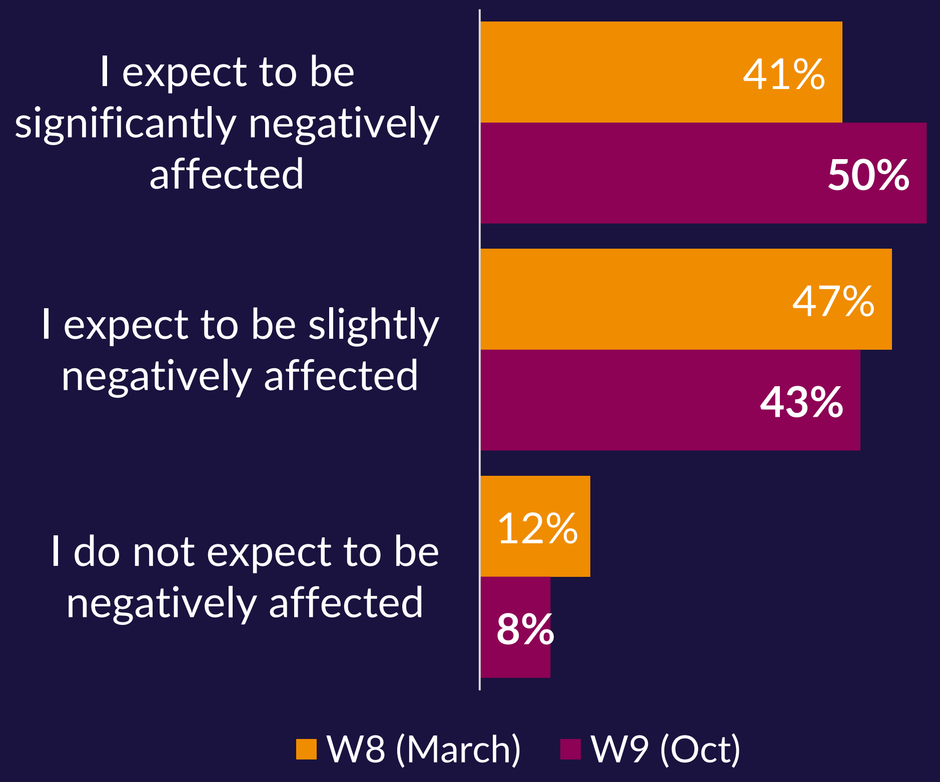
	Oct	Mar	Feb
Spain	+46	+48	+53
Italy	+11	+17	+18
France	-1	+5	+6
Northern Ireland	-18	-6	-8
Great Britain	-31	-19	-14
Republic of Ireland	-53	-37	-33

N = 760

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

Notable increase in number saying they will be significantly affected by cost of living increases – now half of the population.

Extent to which they expect to be affected by cost of living



More likely to be **significantly affected**:

- Females 56%
- Older, no kids 54%

Less likely to be **significantly affected**:

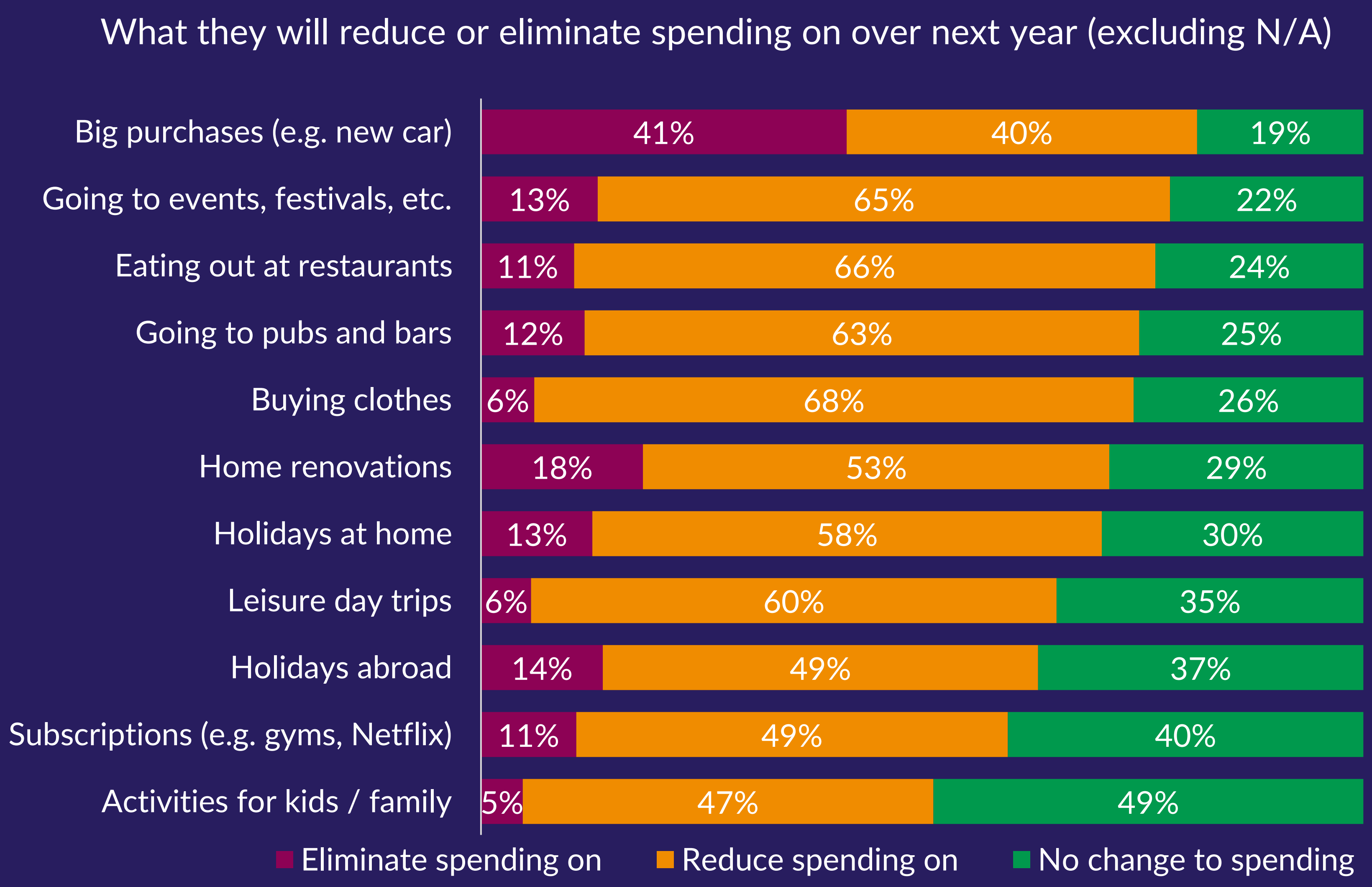
- Dublin 44%
- Males 45%
- Indulgent Relaxers 42%

Notable that number expecting to be significantly affected by cost of living does not differ significantly across age groups

Base n = 760

F1. To what extent do you expect to be financially affected by cost of living increases in the coming months?

Holidays (both at home and abroad) less likely to see reduction in spending vs. big purchases and treats like eating out

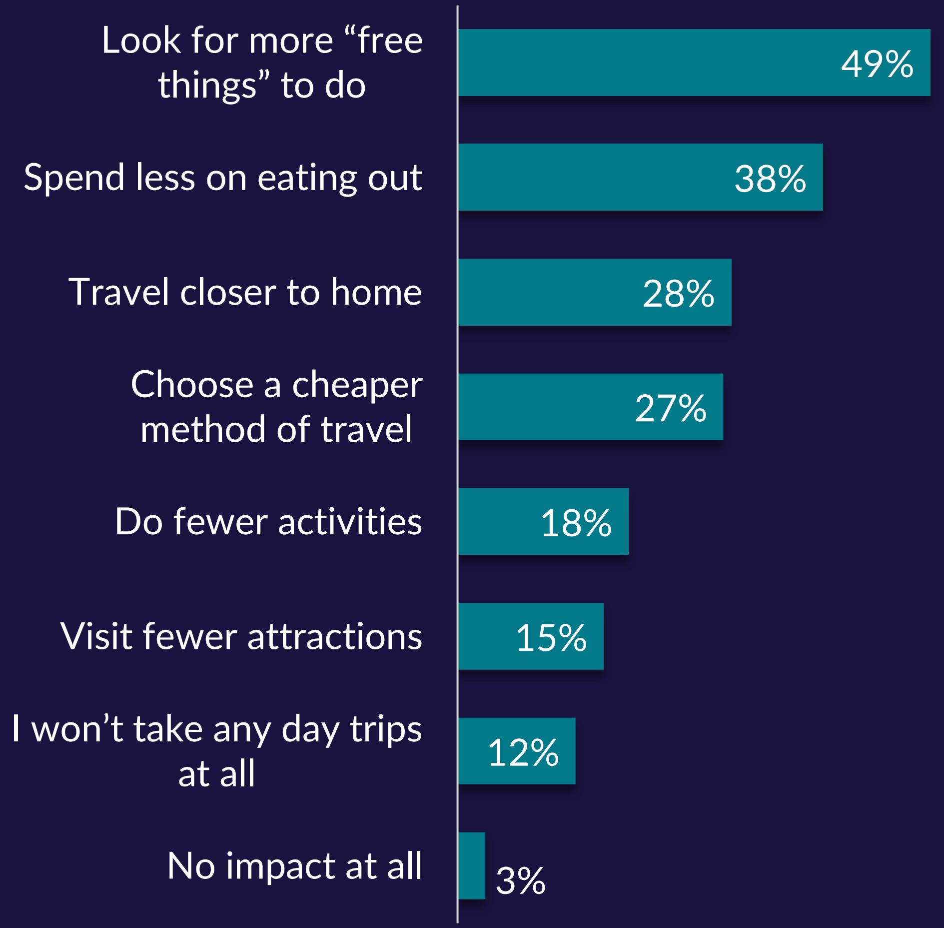


Base n = 760 (excl. N/A)

Please categorise the following activities, taking into account how you expect the cost of living increases to impact your spend on them in the next year…

Day trip spend likely to be impacted – half will be more inclined to seek out free activities. **Fuel** is a key consideration along with the cost of food and drink

How cost of living will affect day trip planning



Those who’ll reduce day trips or travel closer to home – Top 3 reasons

1. Cost of fuel
2. Cost of food & drink
3. Prioritising saving money

Base n = 760 / 388

F10. Which of the following would you consider doing as a result of recent increases in cost of living if planning a day trip in Northern Ireland in the next few months? / F11. You mentioned you will take fewer day trips or travel closer to home when it comes to day trips. What are the key motivations for this?

Market comparison – Cost of living

People across demographic cohorts in both markets expect to be hit

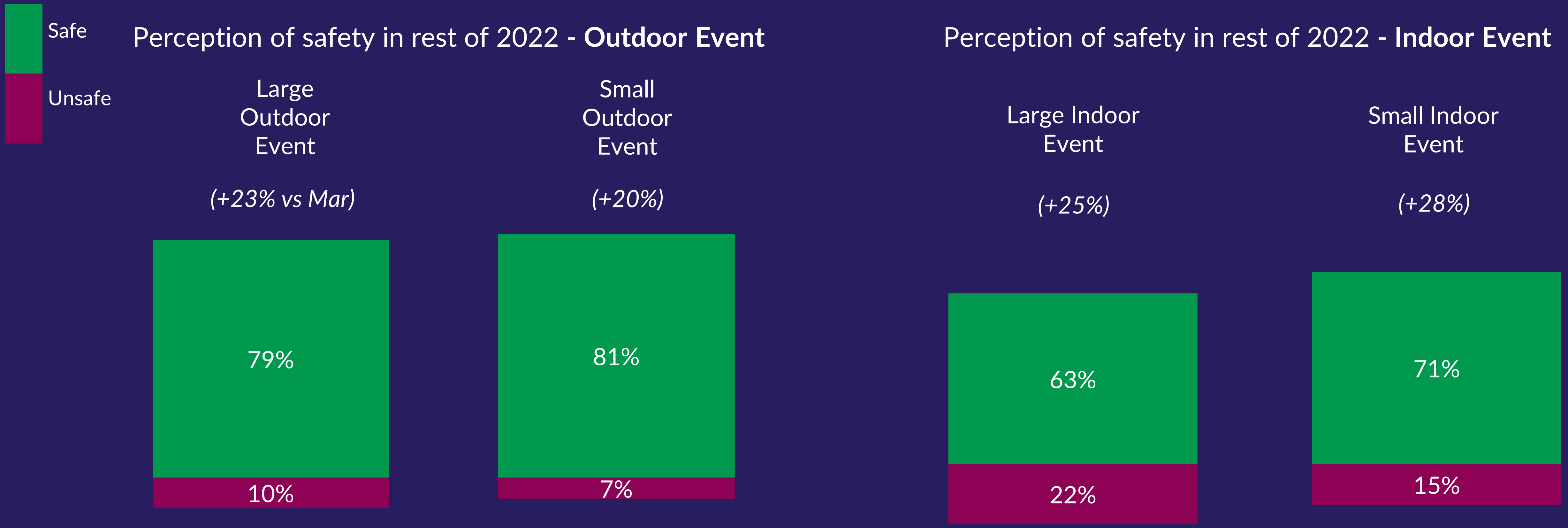
- 50% expect to be significantly affected by cost of living in ROI; 54% in NI.
- Both markets likely to reduce spend on big purchases and home renovations and look for more free things to do on day trips.

NI a bit more negative around things to do

- Those in NI were slightly more likely to say they will reduce or eliminate spend on family activities and eating out.

Events

Significant growth in safety perceptions across event types – nearly 2 in 3 feel comfortable with large indoor events now



Base n = 760

G1. How safe would you feel attending the following live event types in the remainder of 2022?