

Consumer Sentiment Analysis

Covid-19

17 June 2020



tourism
northernireland

Consumer sentiment summary

- Consumer travel intentions suggests a more optimistic outlook is emerging, particularly in relation to domestic short breaks where half of NI and ROI consumers are planning a short break in Ireland
- However the pandemic is already having or will have a significant financial impact on the majority of households
- To escape, relax and have fun are what people simply want to do on their future break – as long as they can do it safely

Consumer mood has been predominantly negative and concern levels are high with the pandemic having a significant financial impact on the majority of people

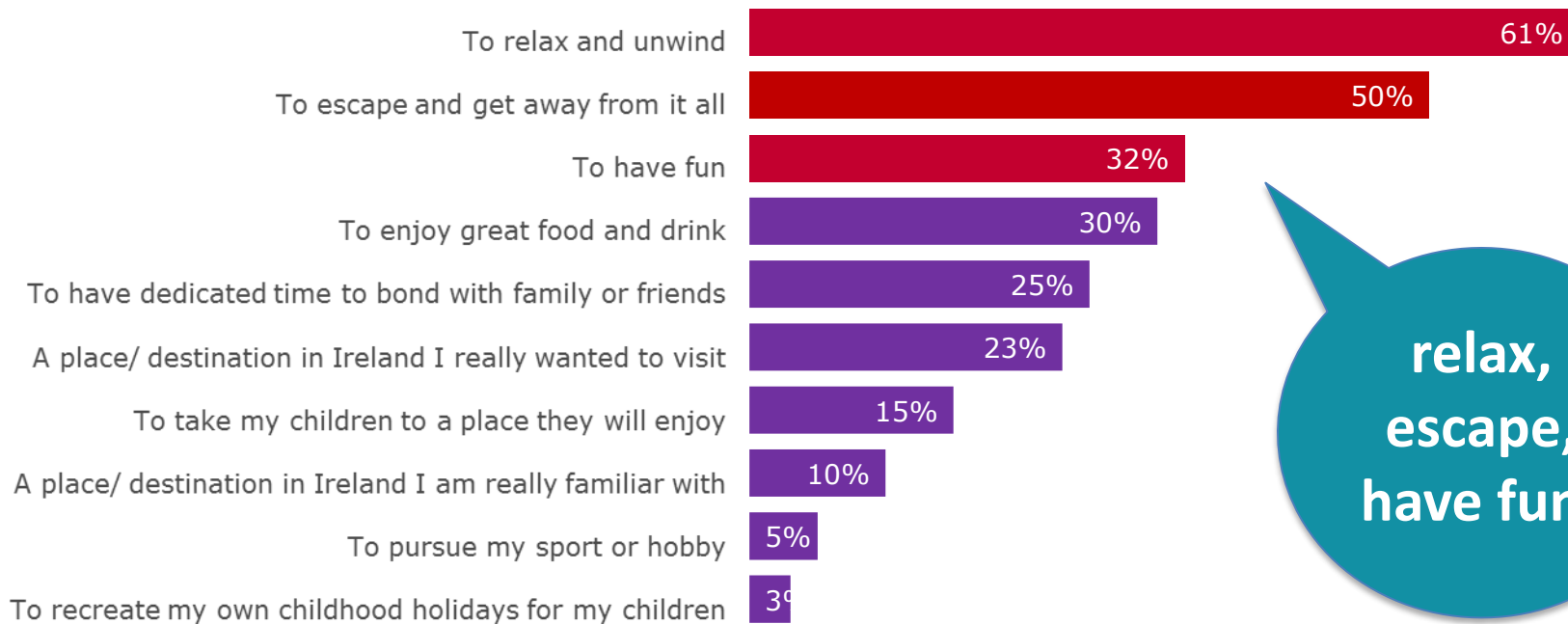
- **29%** indicate that Coronavirus has already had an impact on their household income and a further **28%** state that whilst Coronavirus hasn't yet had an impact on their household income, they expect it to in the future – **57% impacted**
- Just **over a third** (34%) state that Coronavirus will have no impact on their household income with the 65+ age band and those in socio-economic groups ABC1 state are less impacted than average
- **A third** of NI consumers are largely confident in taking the required safety precautions (32%) and **over three quarters** are carefully adhering to best practice behaviours such as social distancing and appropriate hygiene (78%).

Short break intention has picked up slightly with half (51%) of consumers across the Island of Ireland now planning a trip in Ireland.

- By comparison, intentions for longer breaks show no movement, likely due to household finances being impacted and caution on decisions made on sun holidays
- Whilst there is a lack of international bookings has not translated into an uptake as regards domestic bookings in Ireland
- Many people are extending their short breaks from 2/ 3 nights to 4 nights.

What will they want to do?

The most important reasons for taking either a short or long trip for consumers in NI and ROI

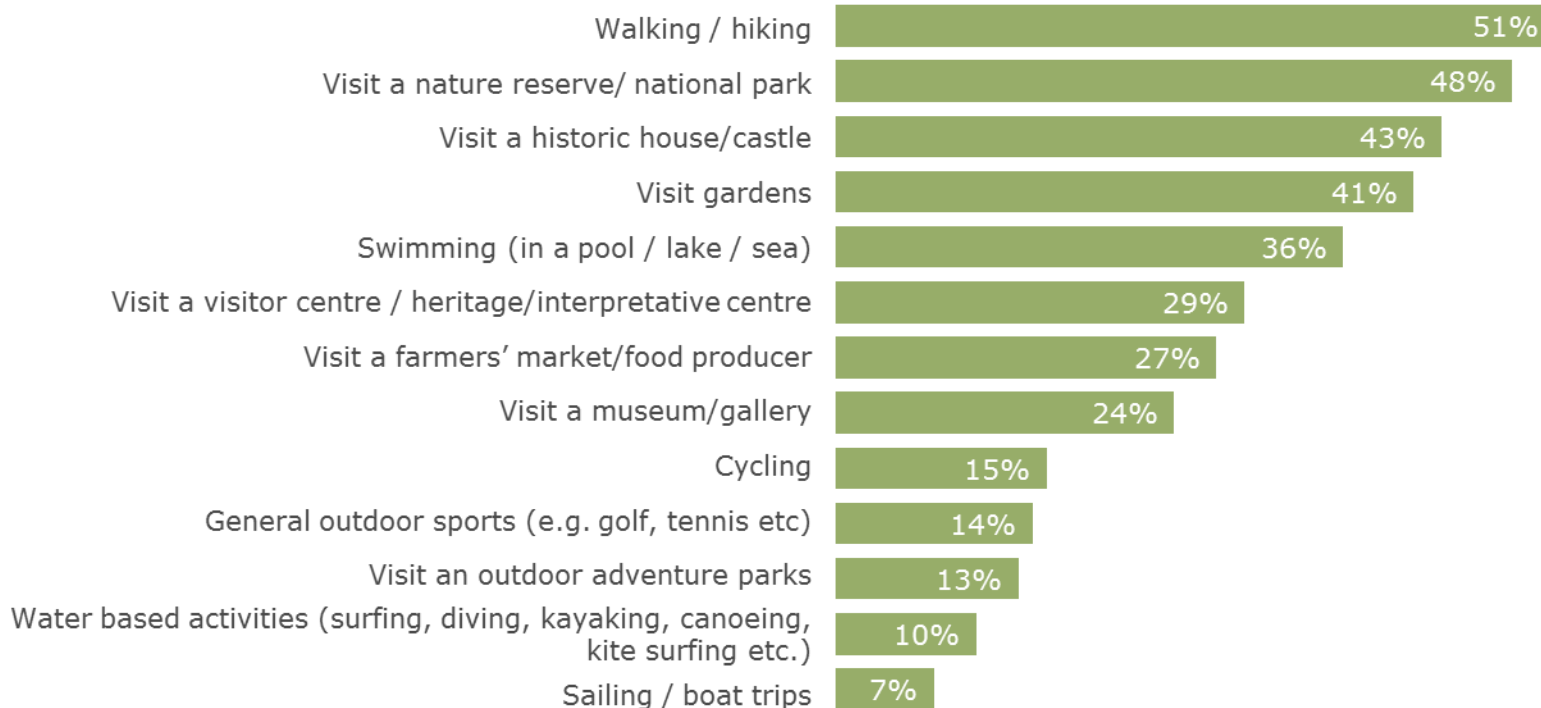


**relax,
escape,
have fun!**

What will they want to do?

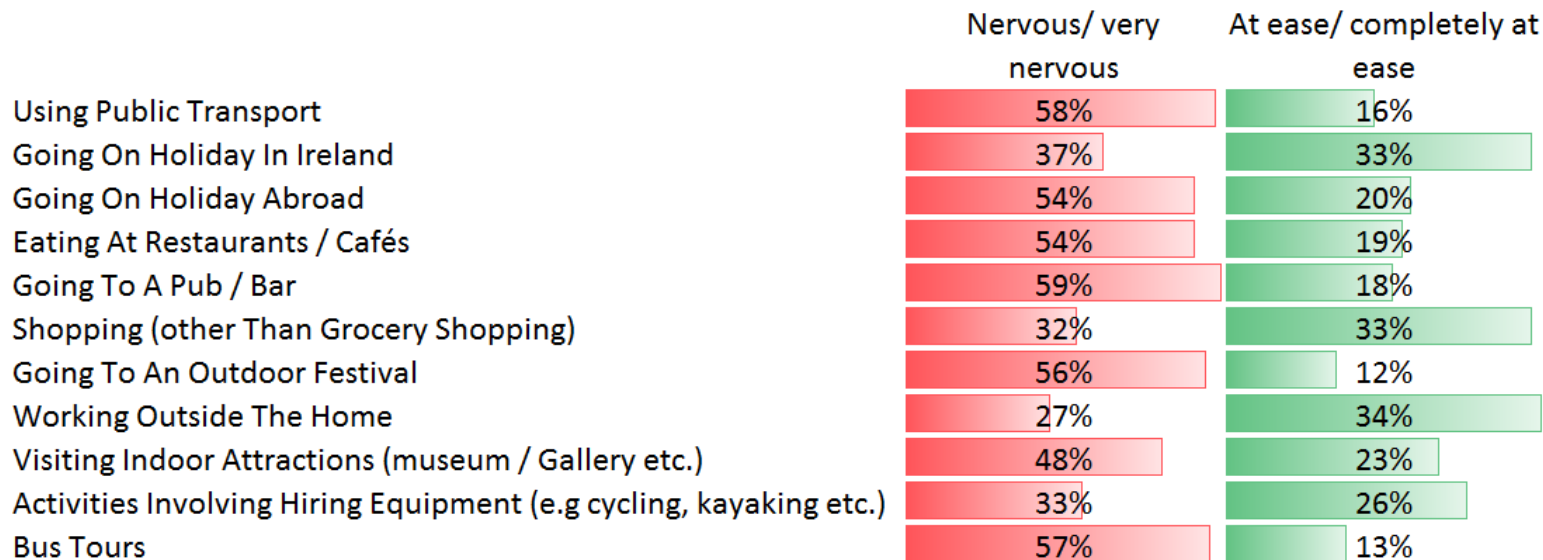


For those who intend to take a short trip in NI or ROI, 'escaping to the country' and historical and cultural visits are high on the list



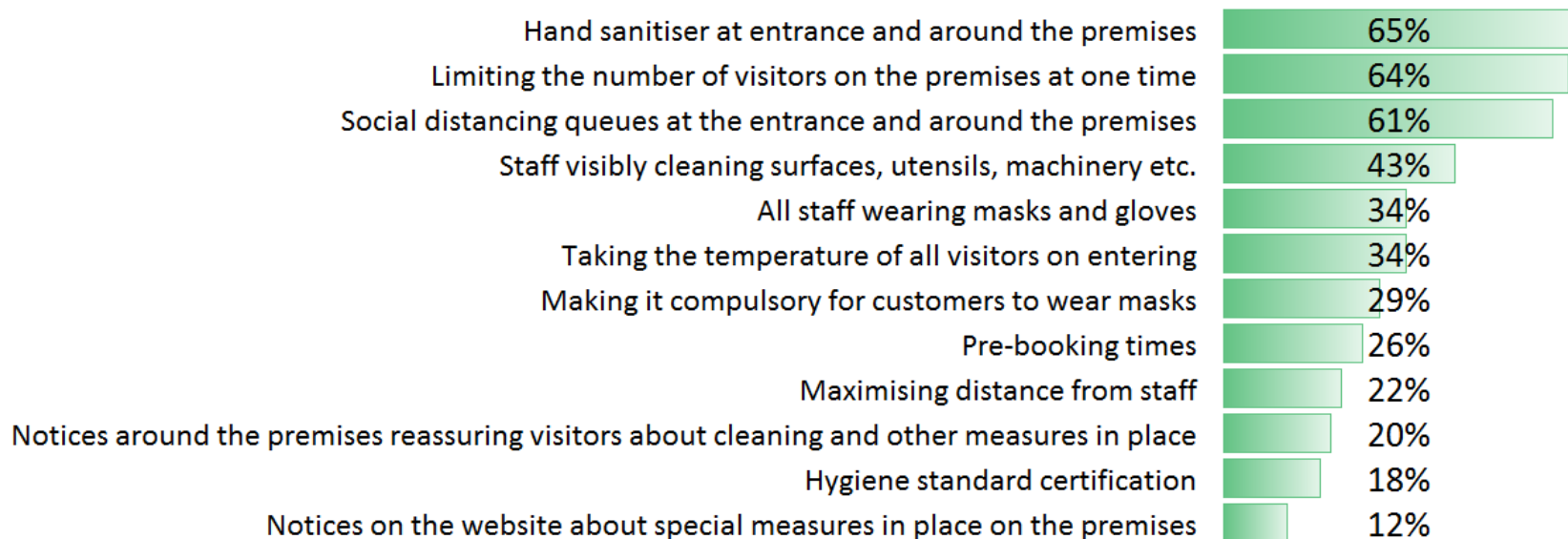
Comfort levels

How NI consumers feel about engaging in the following activities in the up-coming weeks:



Comfort levels

Clear implementation of hygiene measures and social distancing enforcement are the key actions that would make NI consumers feel most comfortable about visiting attractions when they reopen:



Sentiment across the UK



- The latest results for the **UK Covid-19 Consumer Tracker** report for the period 1-5 June indicate that sentiment towards travel appears to be improving slightly
- 28% consider themselves fairly or very confident they would be able to take a holiday or short-break during the peak July/August period this year
- The main reasons driving this relative lack of confidence are again led by restrictions on travel by government (52%), fewer opportunities to eat or drink out (51%) and concerns about catching Covid-19 (45%)
- For the summer period, countryside/village and traditional coastal/seaside town destinations lead with 31% and 30% shares respectively
- Cities move into second place for trips scheduled from October onwards with hotels/ motels and inns the preferred accommodation type.