

Consumer Sentiment in NI & ROI

Covid-19

25 June 2020



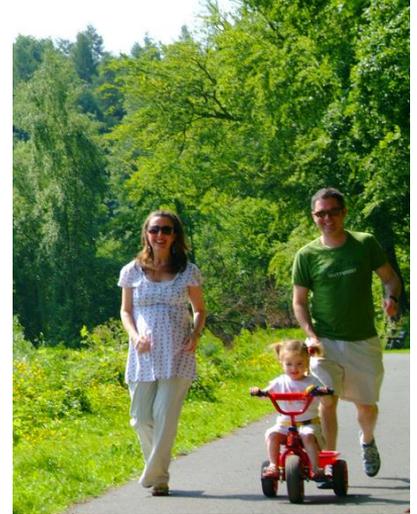
tourism
northernireland

Background and Methodology



Failte Ireland consumer sentiment wave research in collaboration with Tourism NI

- Understanding consumer sentiment, behaviours and attitudes in the context of Covid-19
- Running from March through to August
- Sample: ROI: 900/ 1,000 and NI: 300
- Weekly waves now moved to fortnightly/ three weekly
- Data referred to is for the waves conducted between 29 May and 11 June



The Current Mood

Consumers across both NI and ROI continue to be concerned about Covid-19 and how it is impacting them

- Unsurprisingly consumer mood has been predominantly negative
- NI consumers are slightly less worried about falling sick than their ROI counterparts
- 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%).

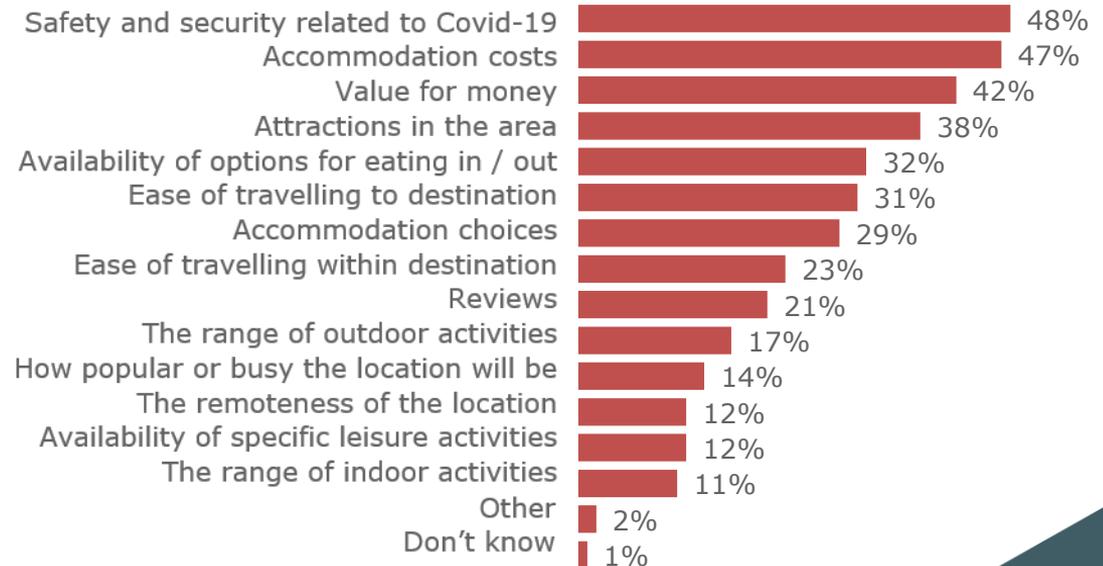


The Current Mood



Safety and security are paramount for consumers, closely followed by the cost of accommodation and value for money perception

- Over half of those planning a trip across the island of Ireland do not expect to pay more for their accommodation, hospitality and entrance fees nor are they prepared to pay more



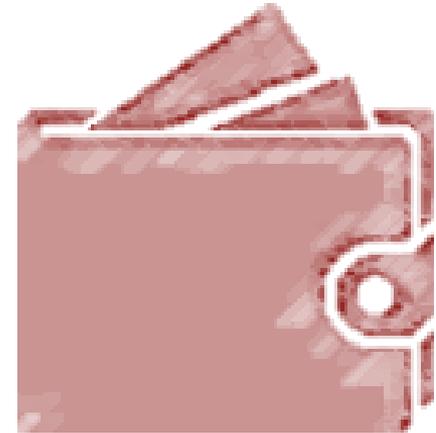
The Financial Impact of Covid-19



The pandemic is having a significant financial impact on the majority of people in both NI and ROI



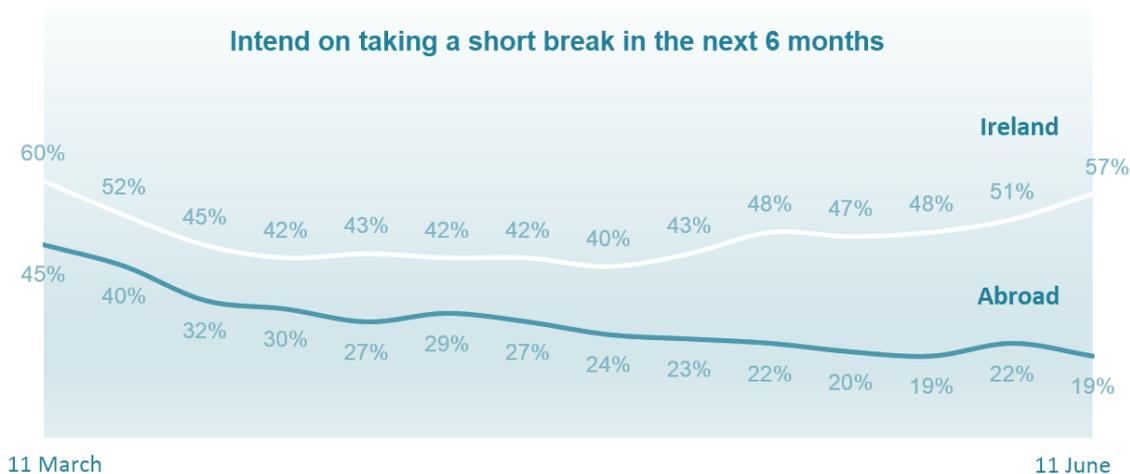
- Across the island of Ireland over 2/3 of households have already experienced a loss of income or expect to in the future
- In NI there has been an increase in early June in terms of those impacted – 57% to 66%
- Nearly three out of 10 (28%) in NI state that Coronavirus will have no impact on their household income with the 65+ age band and those in higher socio-economic groups state are less impacted than average
- Value for money will therefore be important in consideration



Travel Intentions – short breaks

Now that clear road maps have been laid out in both NI and ROI and restrictions are planned or have already been lifted, people are starting to think about holidays closer to home

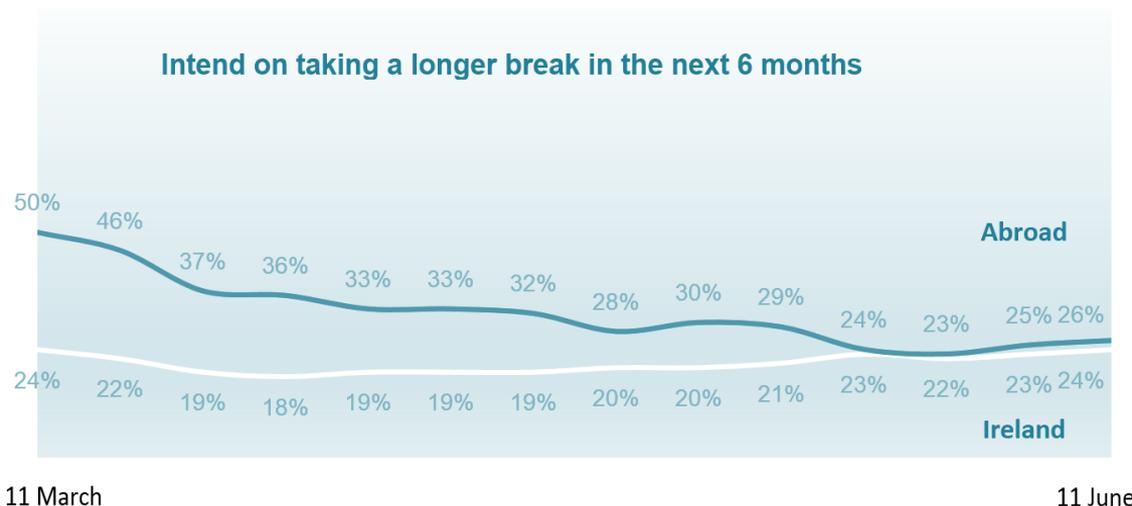
- Short break intention has picked up over the end of May into early June from 51% to 57% of consumers across the Island of Ireland now planning a trip in Ireland in the next six months



Travel Intentions – longer breaks



- By comparison, intentions for longer breaks show no significant movement – household finances/ decisions made on sun holidays
- Whilst there is a lack of international bookings this has not been replaced with longer holiday booking intentions in Ireland
- Many people are extending their short breaks from 2/ 3 nights to 4 nights.



Travel Intentions

Consumers indicate that August and September are when they'd most likely take a short break – the shoulder season is also being considered



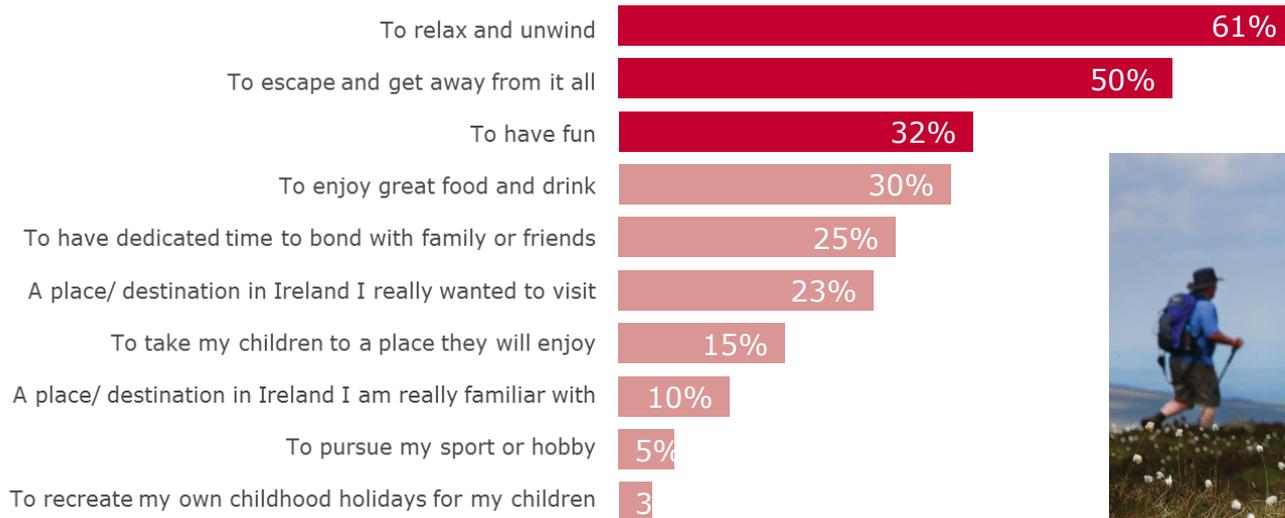
- However, of those who intend to take a break – 4 out of 5 haven't booked yet
- Typically planning 1-2 leisure trips in the next six months – no apparent impact for not being able to take a break since March
- Adults <45 years with no children are more likely to travel (particularly abroad)
- Of those considering a short break in Ireland, two out of five in NI plan to do this in the next six months in NI – Aug/ Sept
- One in nine from ROI
- Shoulder season months – October and November are also being considered



Consumer Needs



After lockdown and movement restrictions, the most important reasons for taking either a short or long trip for consumers in NI and ROI are



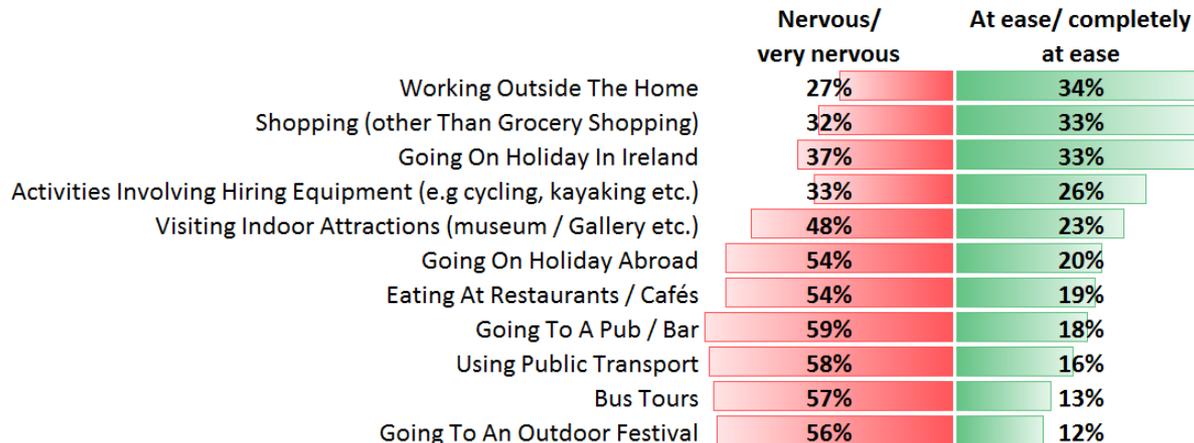
What will they want to do?

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



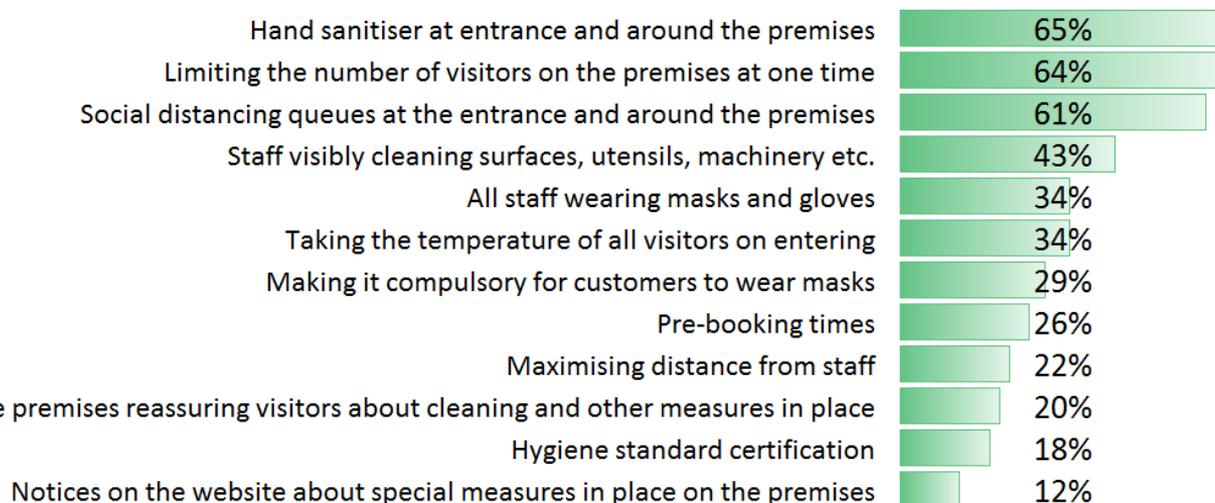
Comfort levels

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



Customers need to feel comfortable

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



} Basic requirements

In summary



Consumers across both NI and ROI continue to be concerned about Covid-19 and how it is impacting them – safety and security are paramount

Travel intentions suggest a more optimistic outlook is emerging, particularly in relation to domestic short breaks where over half of NI and ROI consumers are planning a short break in Ireland in the next six months

Booking hasn't followed on from intention just yet

August and September are popular intended months to take a trip – indications are that the shoulder season will be popular

However the pandemic is already having or will have a significant financial impact on the majority of households so 'value for money' is critical especially for families. The cost of accommodation is very important

In summary



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

Communication of how safety and escaping, relaxing and having fun can be combined are key

Reassurance on safety through visible supporting actions as well as underpinning policies are critical - clear, visible implementation of hygiene measures and social distancing enforcement are the key actions that would make NI consumers feel most comfortable

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