Consumer Sentiment
ROI Market
March 2022 Report

tourism northernireland

SPARK
The Strategic Insight Agency

Research background

Research Background & Objectives

This is the **7th wave** of our consumer sentiment research with the Republic of Ireland (ROI) market. We have continued to look at ROI consumer attitudes towards travel in Northern Ireland (NI) and elsewhere, keeping an eye on how perceptions are changing as the Covid situation changes.

The research objectives:

- Determine the current consumer sentiment towards Covid
- Explore current attitudes towards travel
- Understand recent travel experiences in NI
- Assess current attitudes towards travel in NI, ROI and further afield

What was happening during fieldwork?

Fieldwork Dates 4th – 16th Feb

21st Jan

Coronavirus: Irish government removes most of its Covid rules

7th Feb

Covid-19: Cases fall by 17% worldwide in past week, deaths fall by 7% – WHO

14th Feb

Northern Ireland removes Covid-19 restrictions from tomorrow

16th Feb

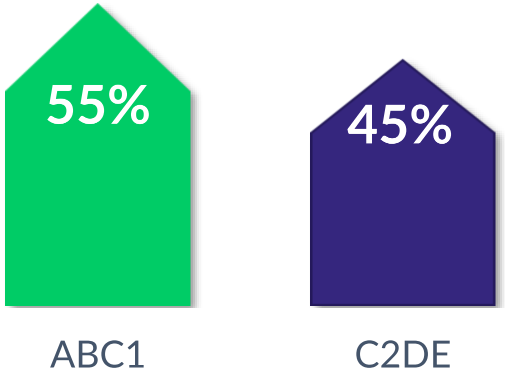
Taoiseach indicates mask-wearing rules could be eased

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

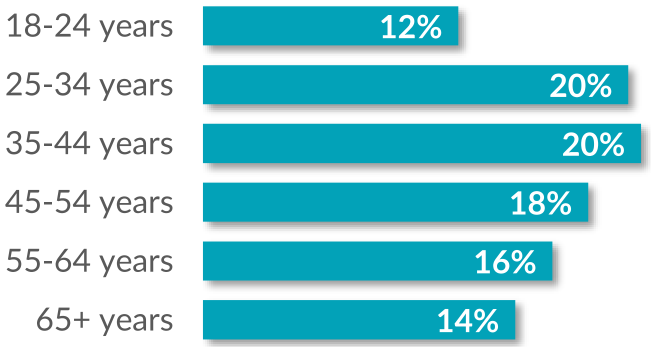
Total sample = 750

Gender

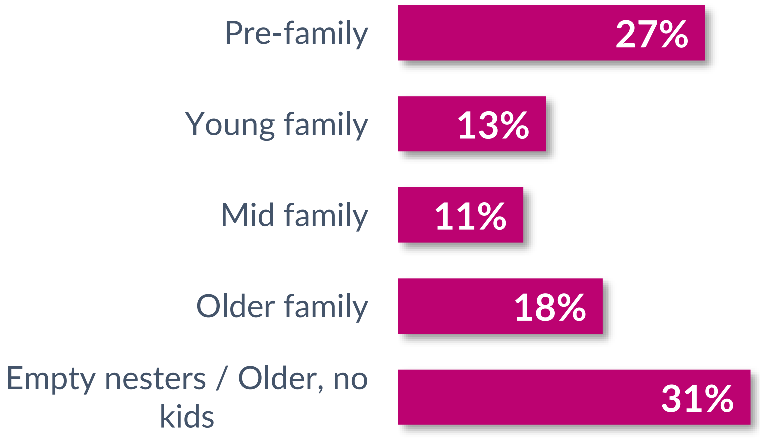
Social Grade



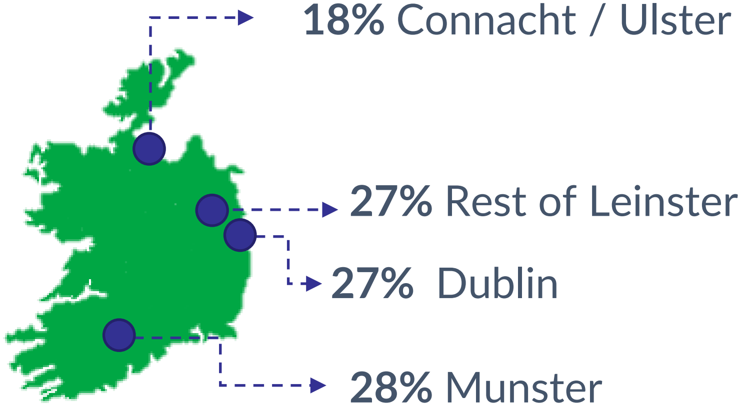
Age



Life stage



Region



Base n = 750

Key Takeaways

Things are (finally) looking up

- Nearly 90% of those in ROI think the situation will stay the same or get better with regard to Covid in the coming month
- And this has impacted very positively on perceptions of safety and security when it comes to travel – 73% think it would be safe to travel to NI this winter/spring, up 28%

…as are travel intentions for NI (and elsewhere)

- Short break intentions to NI grow 6% vs. November wave to 23%, while long break intentions grow 3% to 12%
- But important to note significant re-emergence of plans for travel abroad – 31% now planning trips abroad for spring and 36% for summer

Most are now comfortable with indoor activities – comms should reflect this

- Huge increases in sense of comfort with doing indoor based activities – restaurants, pubs and events are all now net positive for ease vs. nervousness

Value for money takes slight hit – but should still be focus, along with quality

- NI still ahead of GB and especially ROI for VFM, with quality and range of food and things to do continuing to perform well - should also be dialled up

Covid-19 and tourism

There is now a real sense of **optimism** as a **vast majority** now think things are going to stay the same or improve over the coming month

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

More negative outlook among **25-34** (18%) and **young family** (19%)

57% saying the worst has passed is the **highest figure** we have had for this question

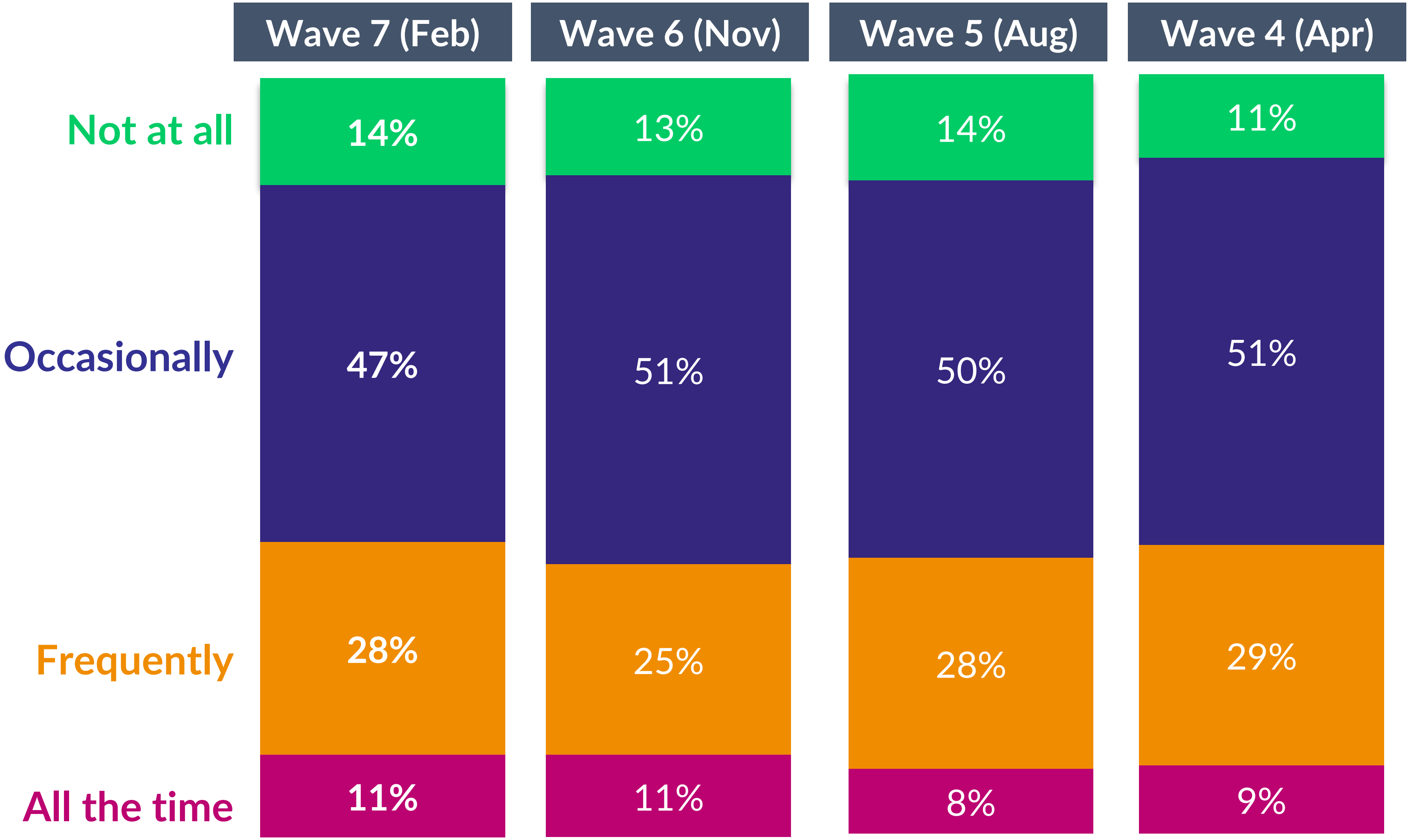
More positive outlook among **55-64s** (63%), **Dubliners** (63%) and **older family** (66%)

Base n = 750

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?

Levels of stress / anxiety **have not dropped**

Stress / anxiety levels during Covid



Most likely to report being anxious frequently / all the time:

- **Female** 44%
- **25-34** 45%
- **Empty nesters** 47%
- **Open-Minded Explorers** 44%

18-24s (24% anxious at least frequently) and over-65s (35%) are the most relaxed age cohorts

Base n= 750

A1b. How would you describe your stress and anxiety levels during Covid-19?

Market Comparison

Covid-19 & Tourism

ROI now more optimistic about Covid than those in NI

57% in ROI think the 'worst has passed' – in NI, this figure is **49%**

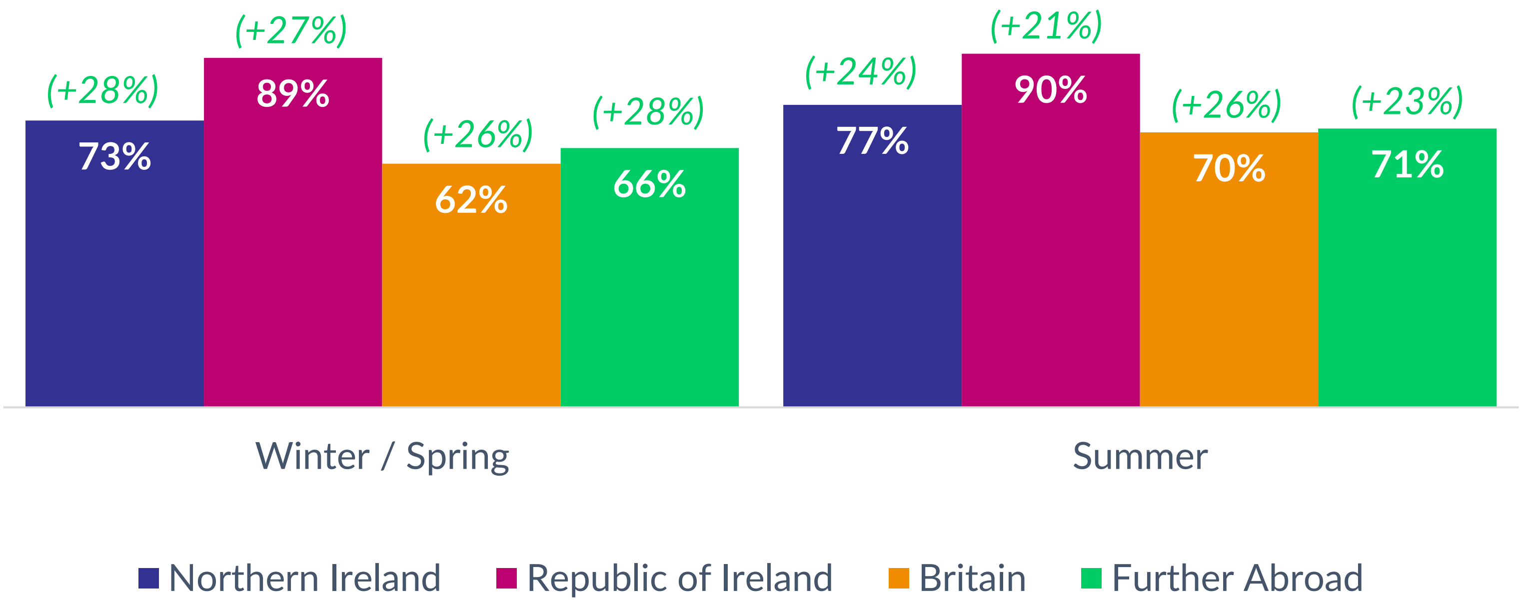
However, levels of stress decrease further in NI than ROI

39% feeling anxious 'frequently / all the time' in ROI and **33%** in NI – NI drops vs. November whereas ROI rises slightly

Current attitudes towards travel

Significant increases in safety perceptions across the board – 3 in 4 now think it would be safe to travel to NI this spring

How safe would it be to go on holiday in… *(scores vs. Nov)*



Base n= 750

B1. How safe do you think it would be to take a holiday or short break in each of the following locations this winter / spring? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations during the summer? 'Safety' specifically refers to the risk of contracting Covid-19.

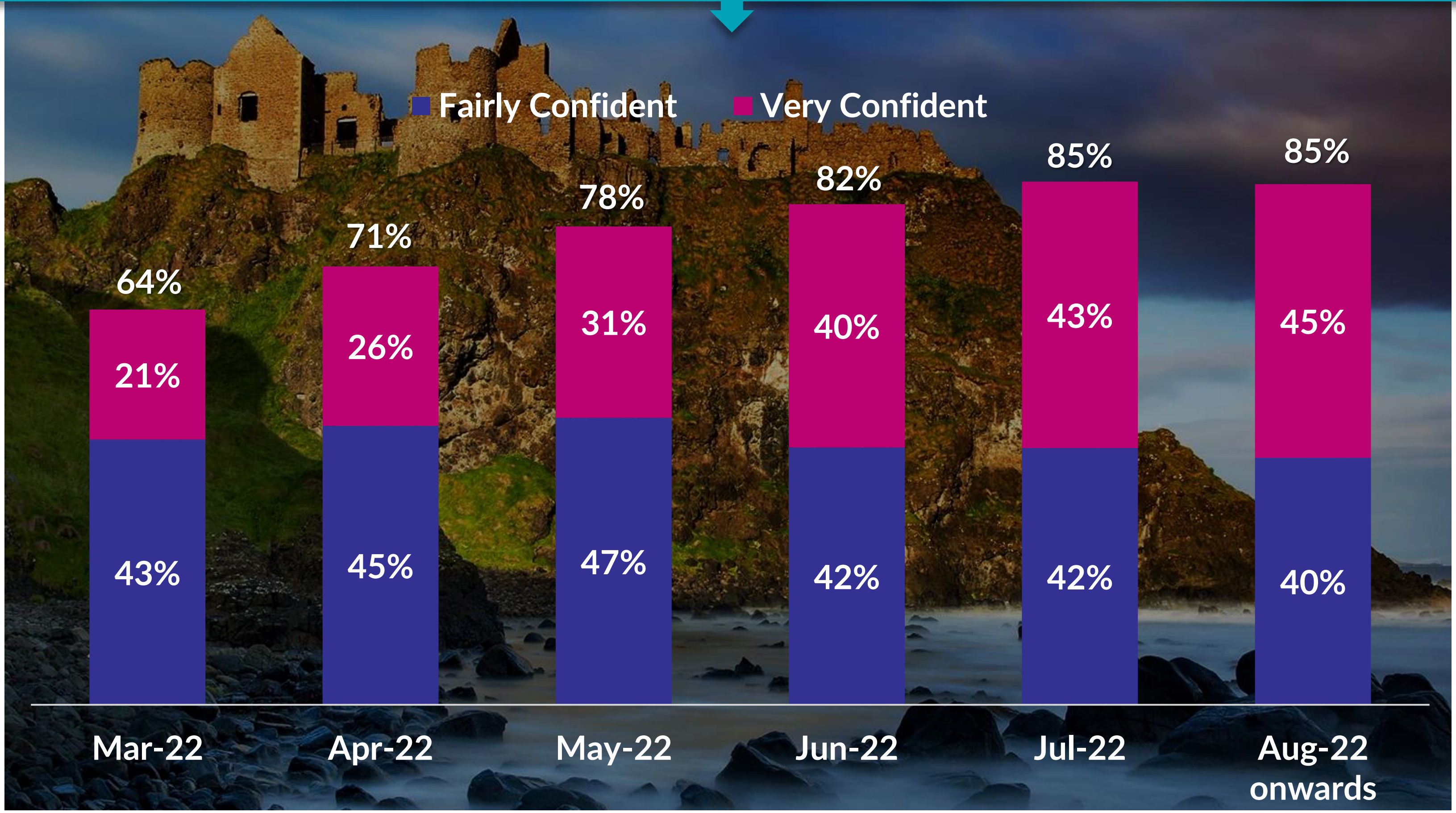
Two in three already confident that a trip on the Island of Ireland would go ahead – rising to 80%+ in summer

64%
would be confident in a holiday on IoI this month

W5 (August): **58%**
W6 (Nov): **29%**

Less nervousness around travel – but many look likely to wait until start of Spring

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

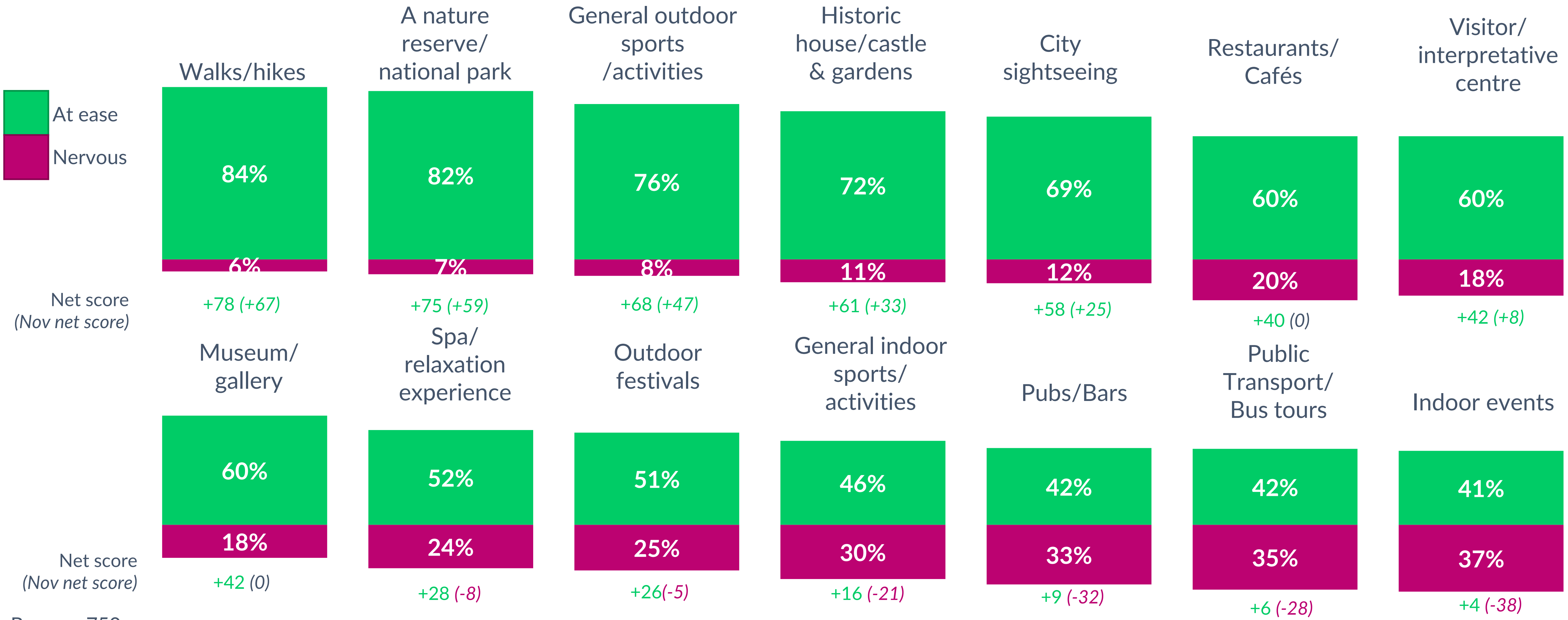


Base n= 750

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)?

All indoor activities now **net positive regarding comfort**

Ease in engaging with activities this winter / spring

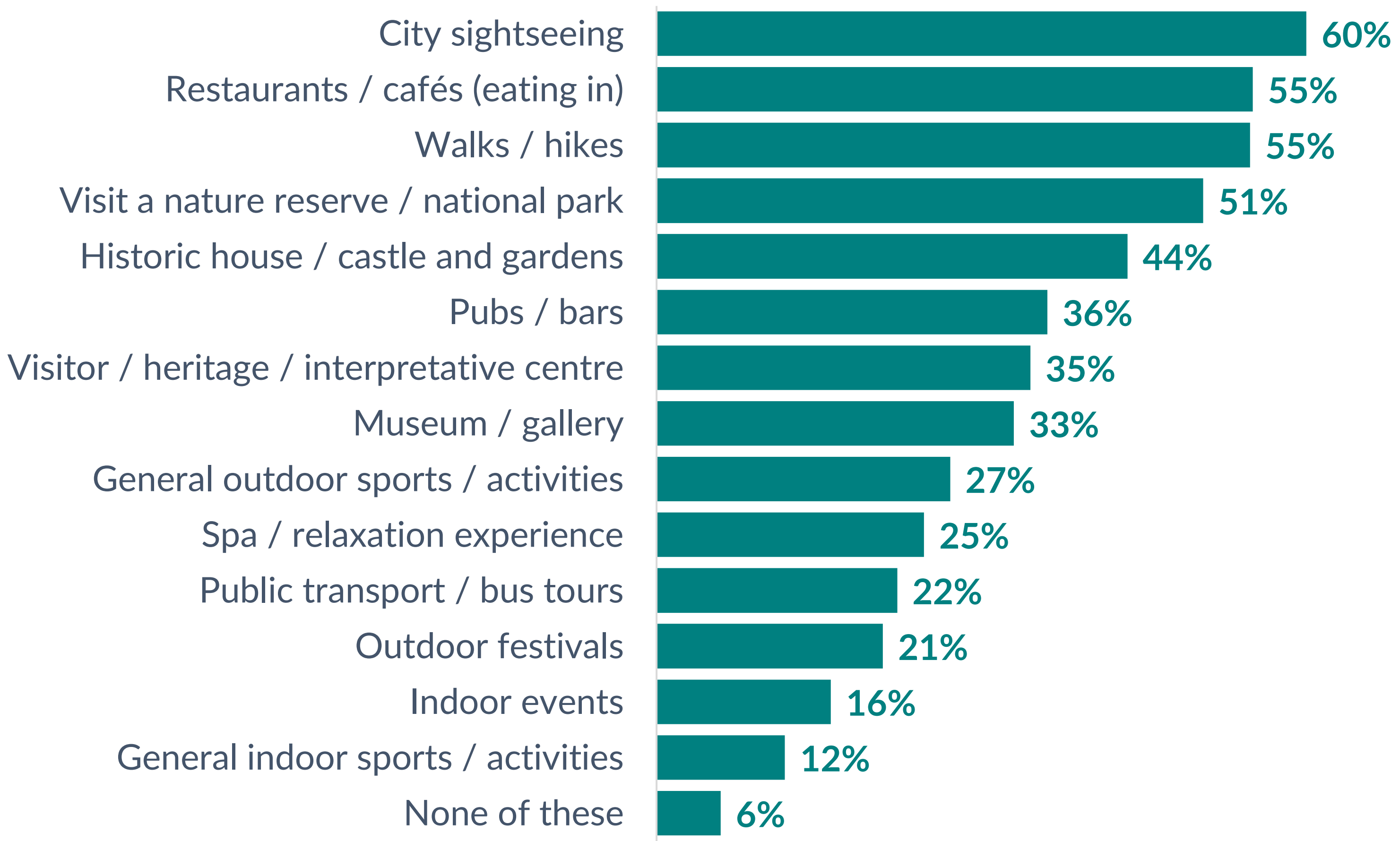


Base n= 750

B4. How do you currently feel about engaging in these activities this winter / spring?

Interests when visiting NI generally align with indoor safety perceptions, with restaurants/cafes high up the list

What they'd be interested in if visiting NI



Very similar hierarchy for those considering or taking trips to NI – although walks/ hikes and visitor/ heritage centres rank slightly higher

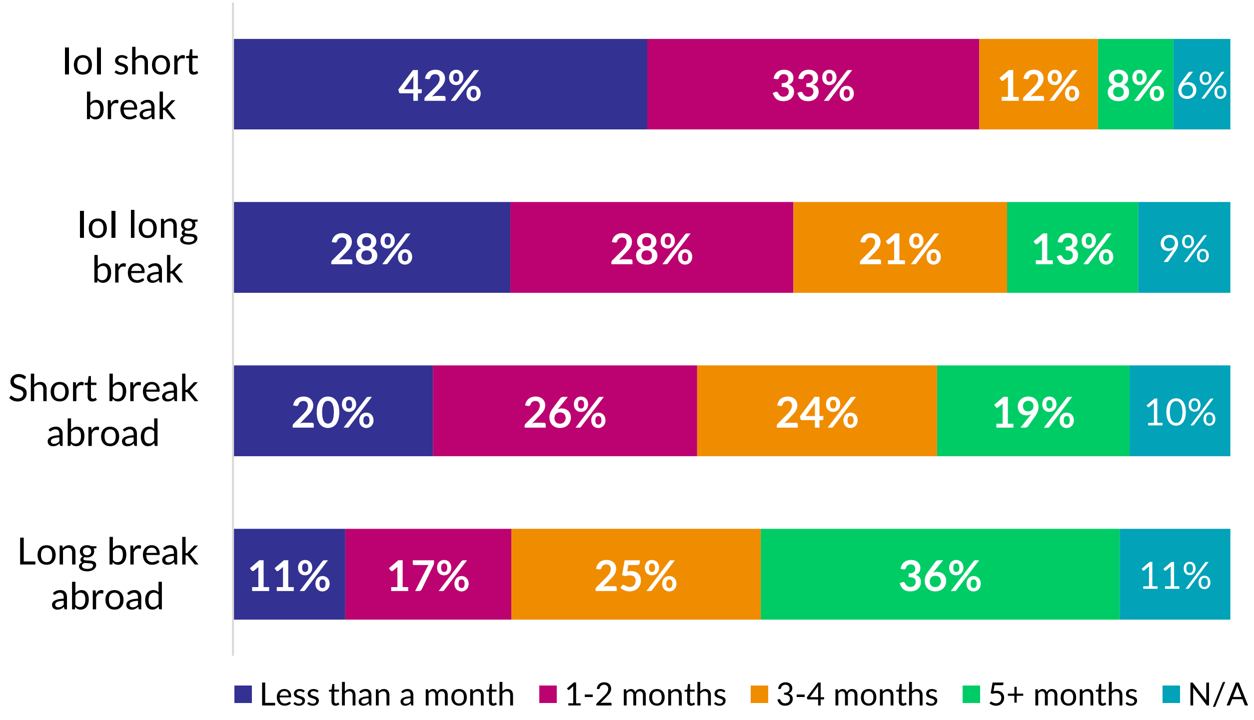
Pre-family more interested in **pubs** (43%) / **restaurants** (61%) / **indoor events** (26%)

Those with kids at home more interested in **nature reserves** (58%)

Base n = 750

B5. If you were to go on a trip to Northern Ireland today, which of the following activities would you consider doing?

When they'd book (if they were booking a holiday now)



Even longer breaks on the Island of Ireland tend to be booked within 2 months, closer to the date of travel than a short break abroad

And **2 in 5 Island of Ireland short breaks** are booked within a month of travel

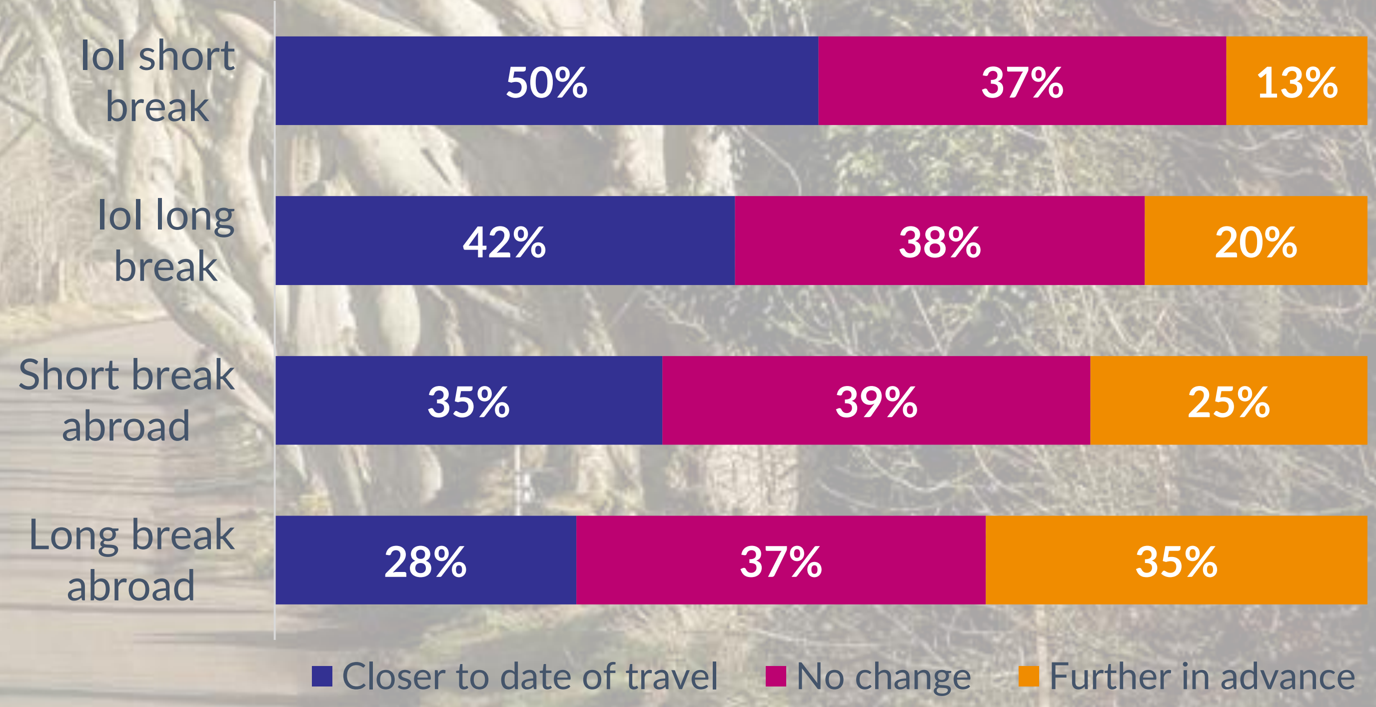
Base n = 750

B6e. 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 winter / spring 2022 (i.e. February – May)?

Booking behaviours have changed with nervousness around cancellations: **half** are booking short breaks on the Island of Ireland **closer to the date of travel** than they would have before Covid

Base n = 750

Are you booking holidays closer to date of travel or further in advance for the following?



We'd now like you to think about the answers you just gave. Thinking about the booking process for holidays or short breaks, would you say you are booking holidays further in advance or closer to the date of travel than before Covid (i.e. pre-2020) for each of the following?

Refunds remain the key incentive to consider booking a NI trip

Base n = 750

Which offers would increase consideration of NI

When asked what offers would increase the likelihood of considering a short break in NI this year, the top 3 options selected, were:

- Option to cancel with full refund
- Package offering (e.g., 3 nights for the price of 2)
- Accommodation discounts

Hierarchy for those considering trips to NI is the same

Package offerings more attractive vs. wave 6 (Nov)

B7. Which, if any, of the following would make you more likely to consider a short break in Northern Ireland this year?

Market Comparison

Current Attitudes towards Travel

Those in ROI have a stronger perception of safety in their home market and elsewhere

ROI residents' perception of ROI safety at **89%**, NI **73%**, abroad **66%**; respective scores for NI residents sit at **74%, 82%, 50%** - all significantly lower

Travel confidence is also higher among those in ROI, including going into summer

64% of ROI residents would be confident an Island of Ireland holiday wouldn't be cancelled, rising to **85%** in July; for NI residents, **58%** are confident now and this rises to **77%**

Value for money (VFM)

NI takes a slight hit to VFM compared to previous waves – but **still considerably ahead of GB and ROI in particular**

Value for money

	Poor value for money	Good value for money	Net Score Feb	Net Score Nov	Net Score Aug
Spain	8%	61%	+53	+57	+57
Italy	19%	37%	+18	+15	+15
France	22%	28%	+6	+3	+1
Northern Ireland	29%	21%	-8	+1	+1
Great Britain	33%	19%	-14	-15	-12
Republic of Ireland	52%	19%	-33	-29	-34

Net VFM score for those taking trips to NI is **-1** – last time it was **+23**. Increase in costs may have been felt, particularly around/after Christmas

N = 750

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

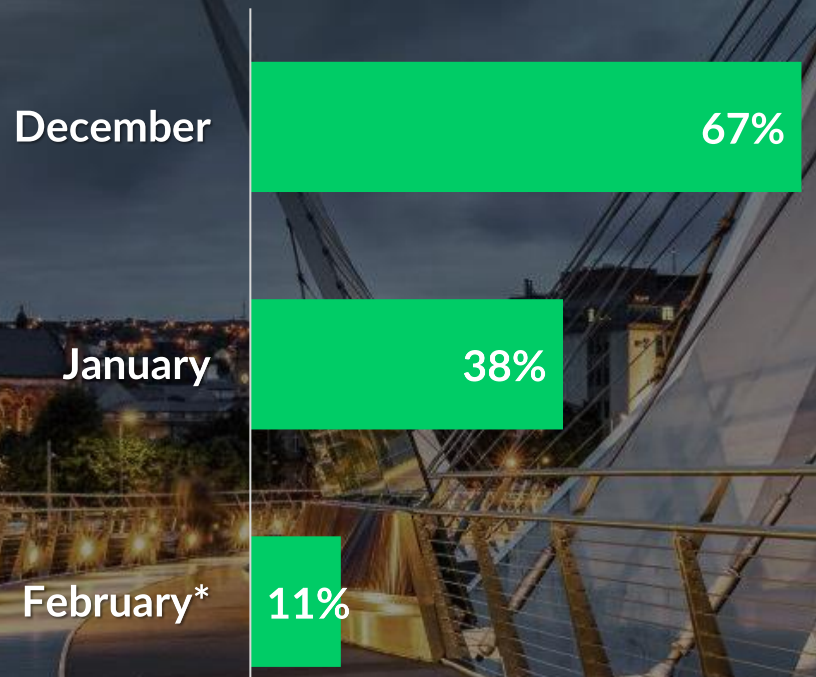
Travel experiences of NI

A significant proportion of our sample travelled to NI over the winter period – with the majority **visiting in December**. Numbers travelling overall increased significantly vs. November

16%
have taken a short break or long trip in NI since December 2021

52% were first time visitors to NI

Holidays taken in…



**Likely lower as fieldwork took place in February*

Other than NI…

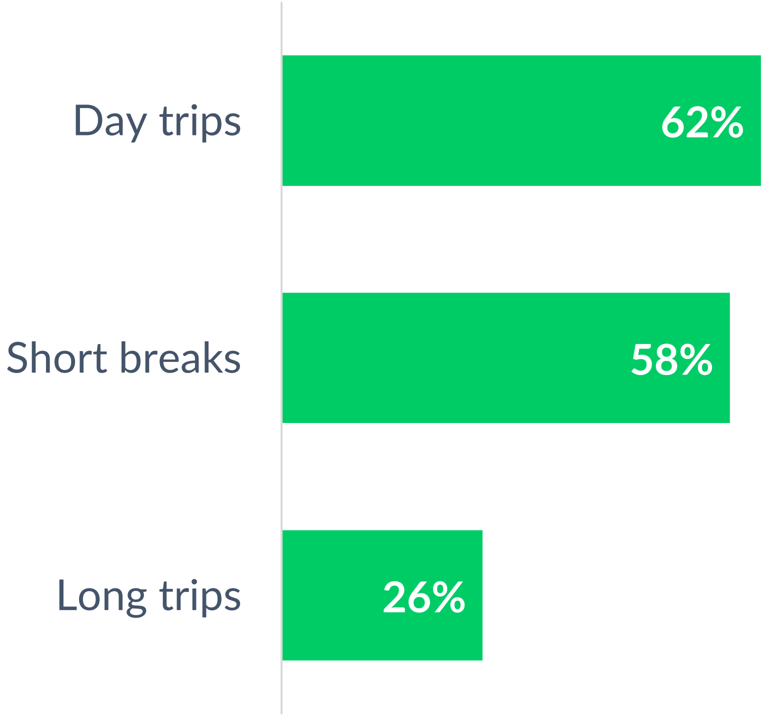
- **43%** took a break in ROI
- **16%** went abroad
- **46%** didn't travel at all *(down 10% vs. November wave)*

N = 750 / 168 visited NI (caution low base size)

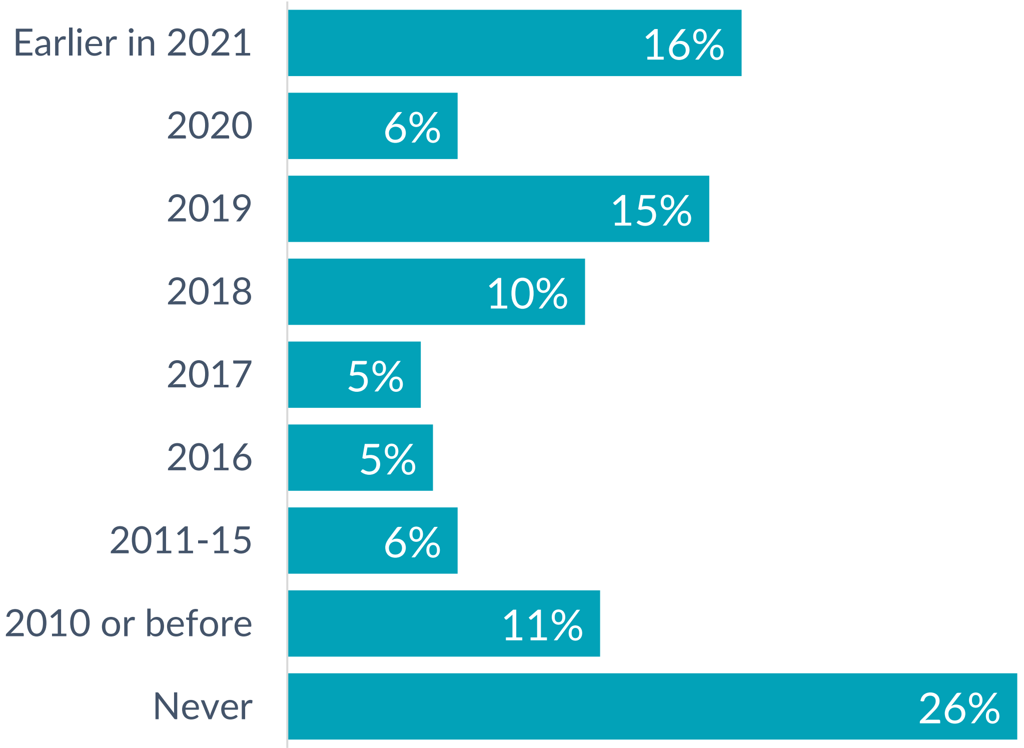
D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes in 2021? / D3. And when did you take your holiday(s) or short break(s) in Northern Ireland in 2021? / D4. Was this your first time taking a holiday or short break in Northern Ireland for leisure purposes?

A significant number of those travelling over winter, mixed day trips and short breaks. 25% of sample last visited NI in 2018 or 2019

% of trips taken to NI which were…



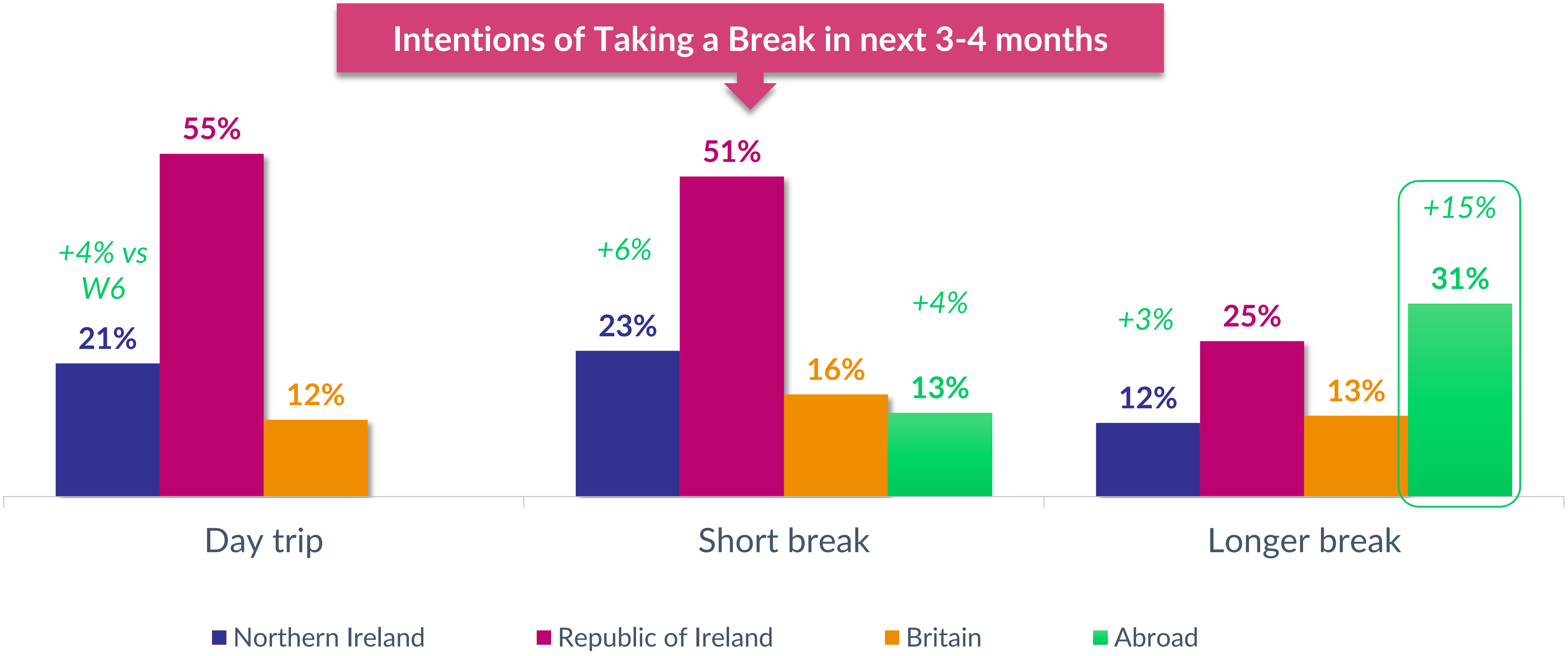
When last visited, if not in winter 2021/2



D1. Have you taken a holiday or short break in the Republic of Ireland, Northern Ireland or abroad for leisure purposes in 2021? /D1b. You mentioned you haven't taken a break in Northern Ireland since the start of December 2021. When was the last time you visited Northern Ireland for a holiday or short break?

Travel intent

Intention to take a break to NI in the next 3-4 months is on the rise, but surpassed by the intention to travel abroad



Base = 750

Multiple Questions

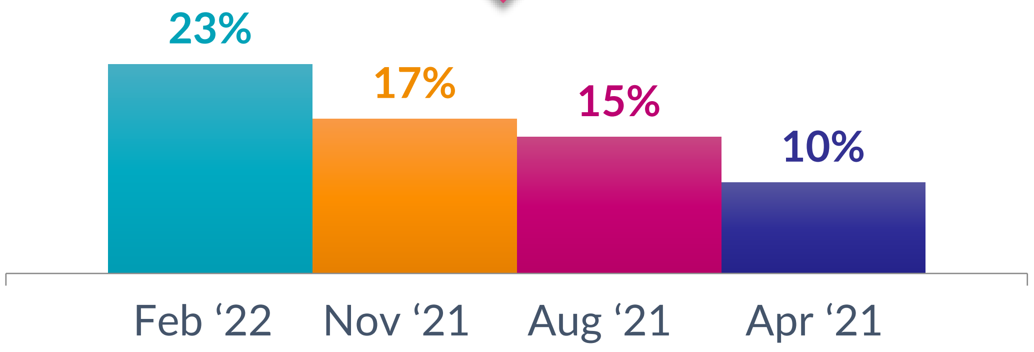
Positive signs as declining Covid cases and relaxion of restrictions see increased intention to take a break in NI

Intention on taking a break to Northern Ireland in next 3-4 months

- 21% Leisure day trip
- 23% Short break
- 12% Long break

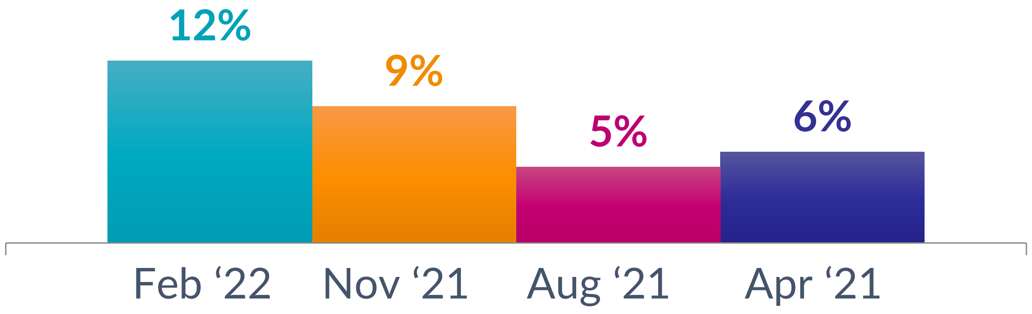
Consideration of break in Northern Ireland in next 3-4 months
(slightly different wording to previous waves: 'intention of break this year')

Short Break to NI



Of those planning short trips, **34%** actively planning (8% total sample)
Short trip intentions highest and increasing amongst **Active Maximisers** (29%) and **Indulgent Relaxers** (25%)

Long Break to NI



Of those planning long trips, **37%** actively planning (4% total sample)
Long trip intentions higher with **Indulgent Relaxers** (18%)

Base (n) = 750

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3-4 months?

Most day trips planned for April/May – the number actively planning is fairly low

N =750

21% considering taking a day trip in Northern Ireland
W6: 17%

How much of your day trip have you planned?

N =160

I have booked	Actively planning	Intend to start planning later	May or may not plan
5%	32%	36%	27%

32% are actively planning a trip to NI – 7% of the total sample

N =160

*Consideration of day trips to Northern Ireland in:

February	March	April	May
13%	22%	30%	27%

26% don't know

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

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3-4 months? / 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?

Positive signs as 1 in 3 planning a short trip to NI and consideration is also on the rise

N =750

23% considering taking a short break in Northern Ireland

W6: 17% W5: 15% W4: 9% W3: 10% W2: 13% W1: 13%

How much of your short trip have you planned?

N =175

I have booked	Actively planning (+8%)	Intend to start planning later	May or may not plan
9%	34%	37%	20%

34% are actively planning a trip to NI – **8%** of the total sample

N =175

*Consideration of short breaks to Northern Ireland in:

February	March	April	May
9%	18%	31%	27%

26% don't know

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

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3-4 months? / 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?

Similarly, growth in the number actively planning long trips to NI

N =750

12% considering a long break in Northern Ireland

W6: 9% W5: 5% W4: 5% W3: 5% W2: 9% W1: 6%

How much of your longer trip have you planned?

N = 88 – caution low base size

I have booked	Actively planning (+13%)	Intend to start planning later	May or may not plan
4%	37%	36%	23%

37% are actively planning a trip to NI – **4%** of the total sample

N = 66

*Consideration of longer breaks to Northern Ireland in:

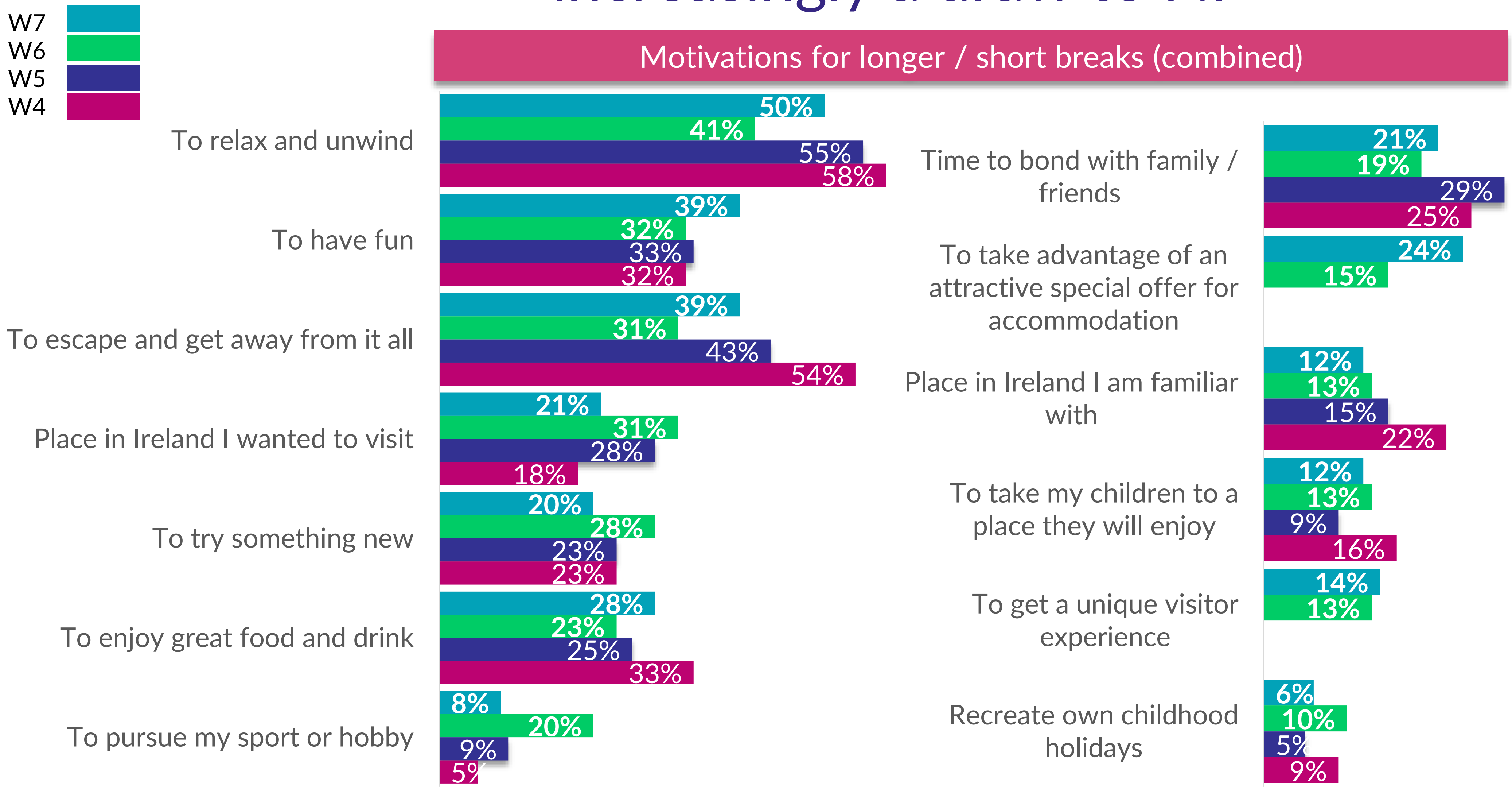
February	March	April	May
6%	19%	13%	45%

26% don't know

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

E1b. Would you consider taking any of the following in the Republic of Ireland, Northern Ireland, Britain or elsewhere abroad in the next 3-4 months? / 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?

Relaxation breaks growing in preference; **fun** breaks are increasingly a draw to NI

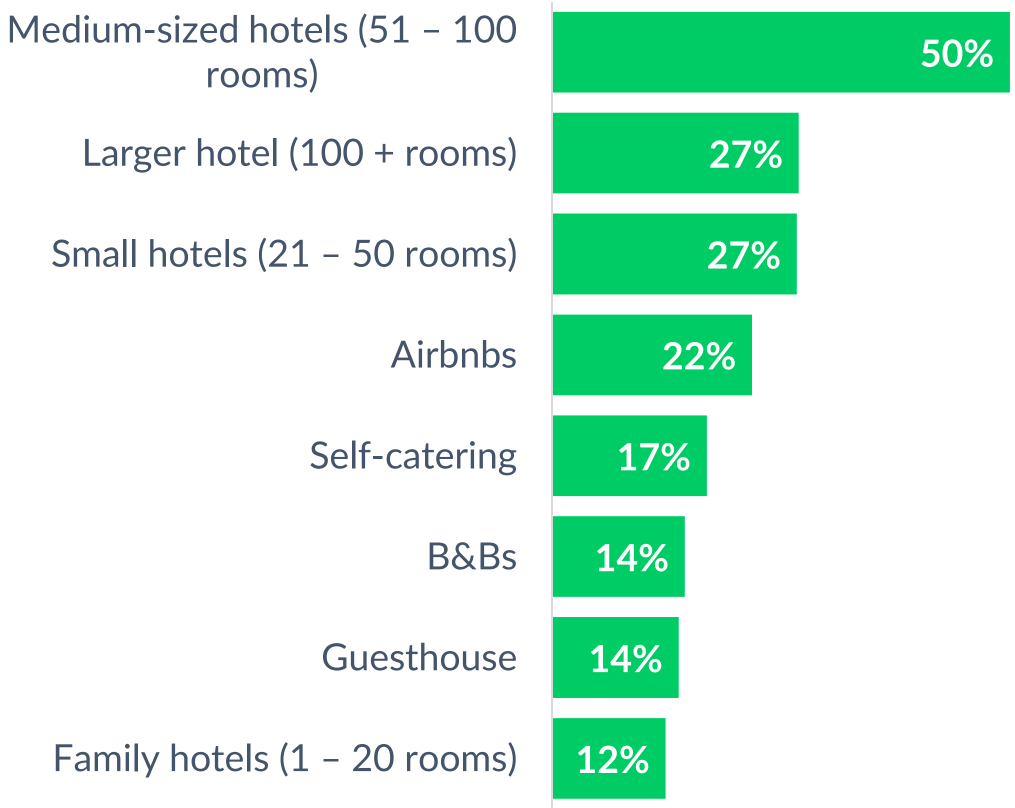


Base = 196

E4. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the short trip?

Most travelling with partners/ spouses, with laid back holidays the preference this time around

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



Self-catering accommodation more popular for those considering summer trips (22%)

Who travelling with (long & short combined)

- 46% Partner / spouse
- 35% Immediate family
- 27% Friends

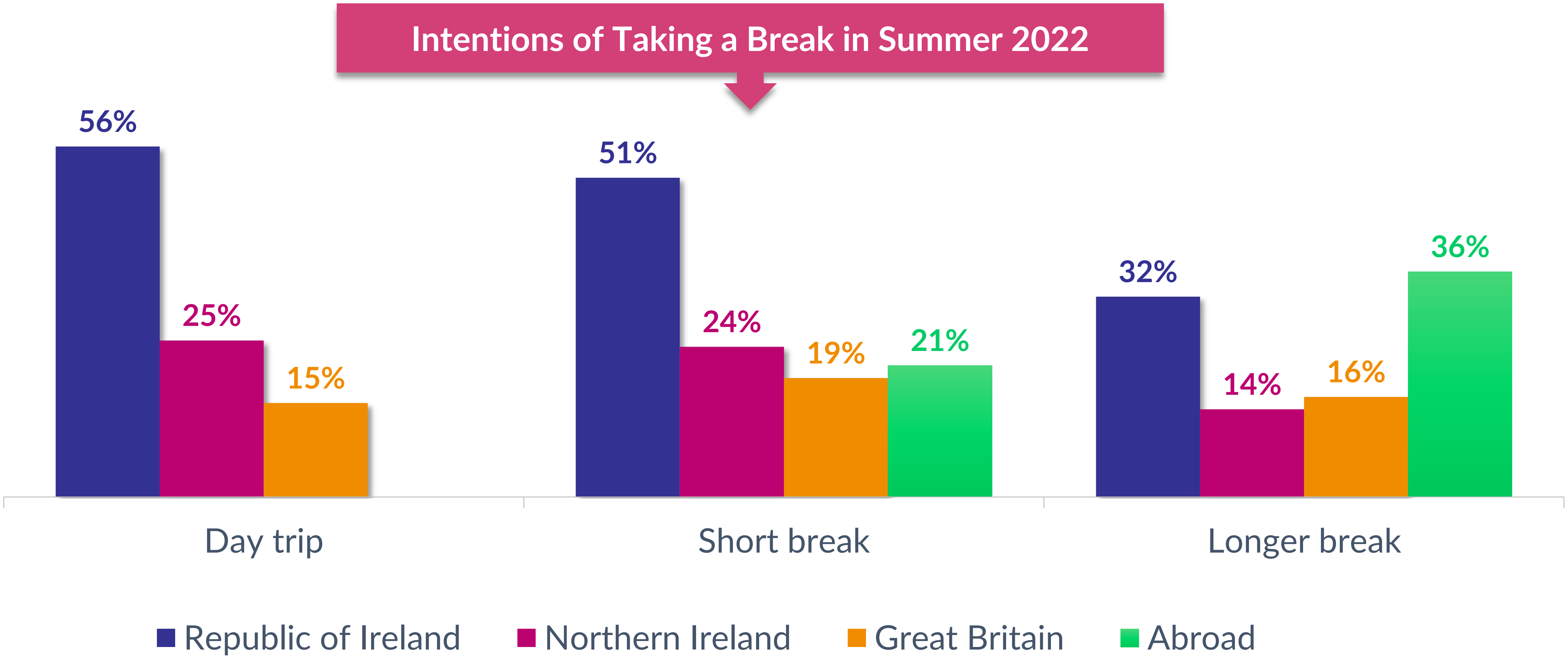
Type of trip preferred

- 52% Laid back holiday
- 13% Exciting holiday
- 36% A bit of both

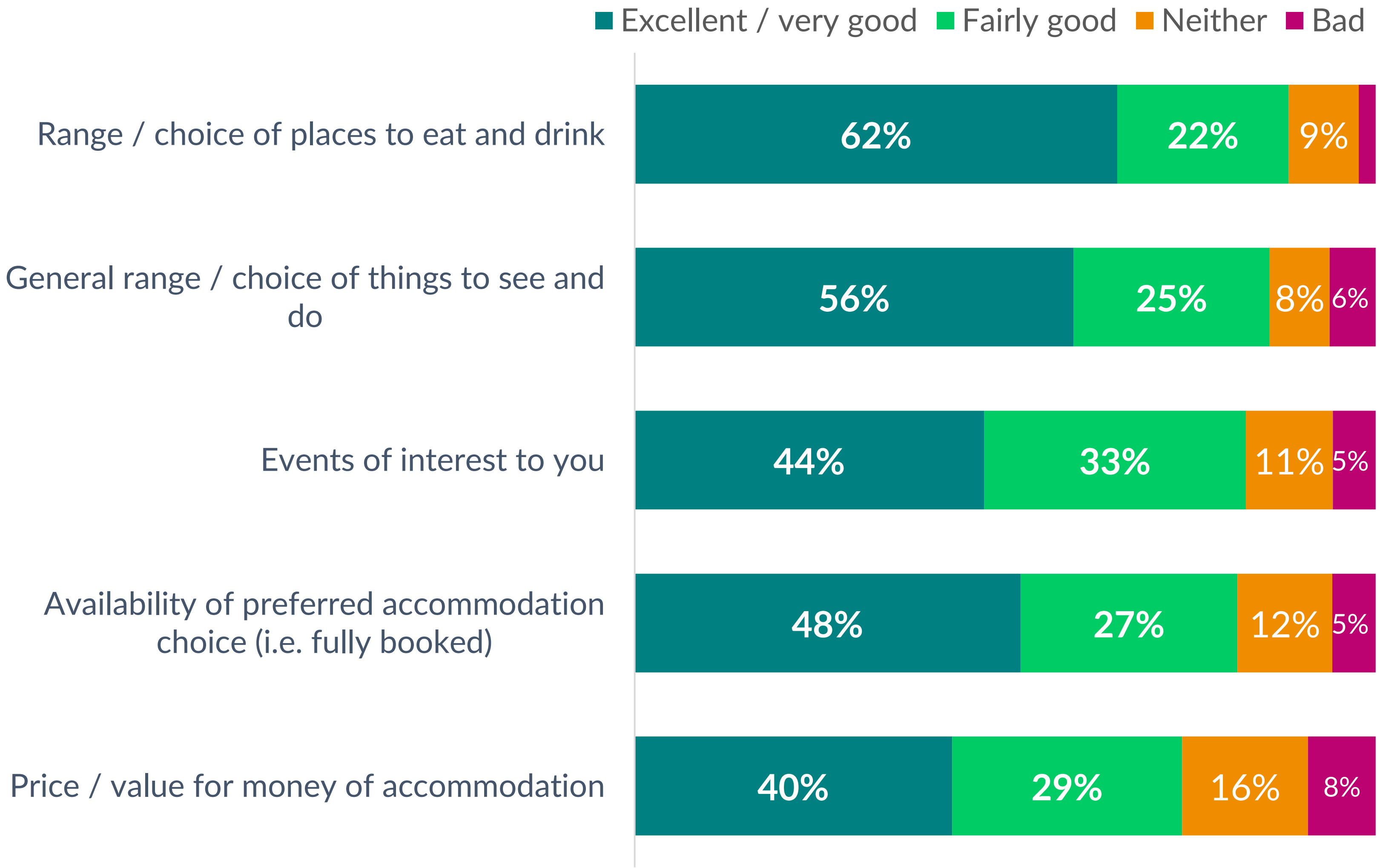
Base = 196

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? / E8. You mention you have taken or booked a holiday or short break in Northern Ireland. How far in advance of the trip did you...

Summer intentions for NI are relatively similar to spring, although slight uplift for longer breaks – good to see since there is clearly pent up demand for trips abroad



How they would rate the following based on research



During research, many are identifying quality of **food and drink choices** as excellent, as well as activities

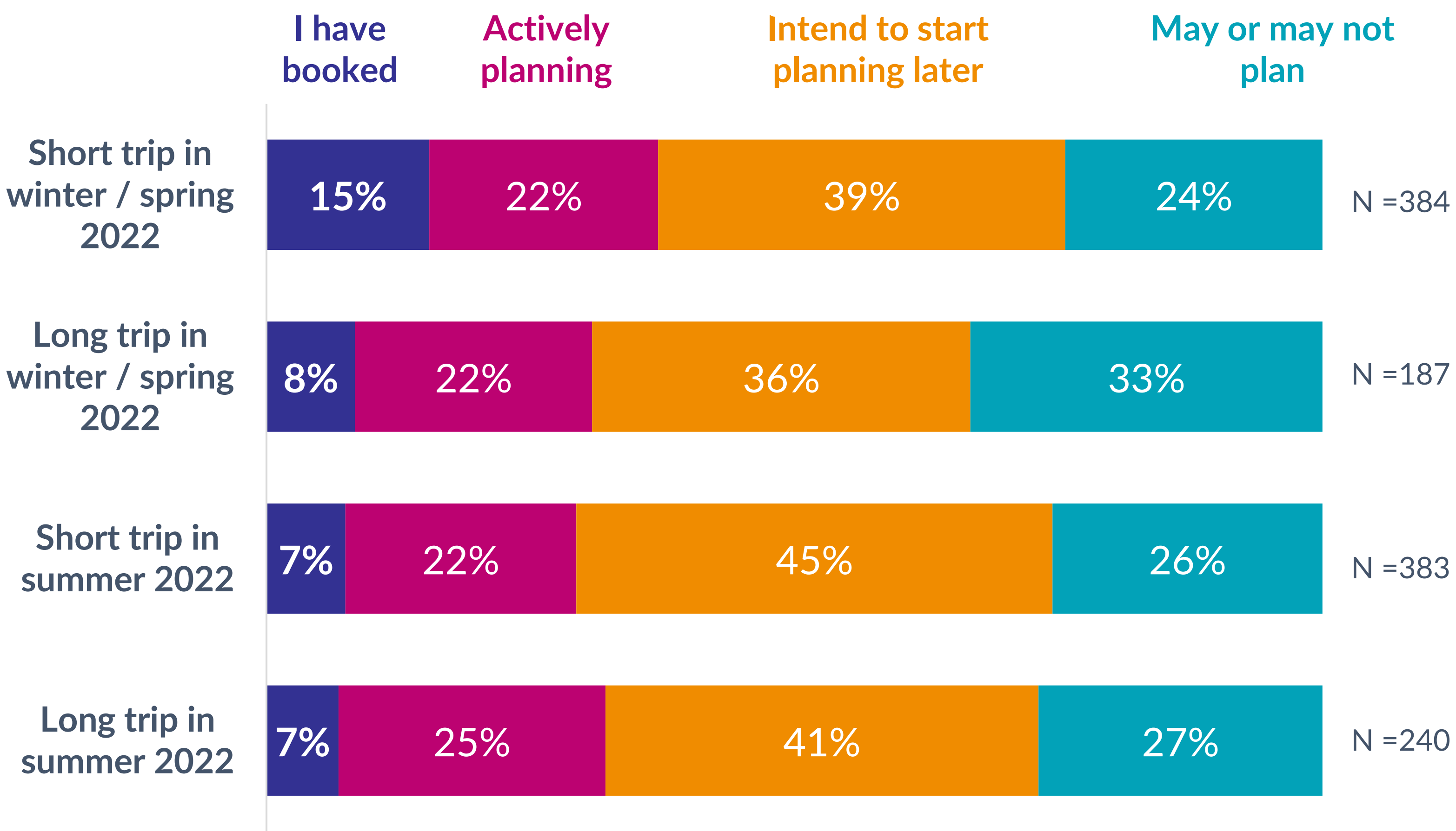
Accommodation VFM is one potential area for improvement but still rated as good by 70%

Base = 179 researched trip to NI

D8b. Thinking about the research you have done for your possible trip(s) to Northern Ireland, how would you rate the following aspects?

Similar to NI, few **have booked their trips in ROI** yet, including long breaks in the coming months

How much of your trip have you planned? (ROI)



18-34s are more proactive in booking trips in ROI; still room to encourage consideration of NI as alternative amongst over 55s – 52% intend to start planning a short summer trip later in the year

E25d. You mentioned you are planning a holiday or short break in the Republic of Ireland this spring / summer. Which of the following best describes your status when it comes to booking or planning this trip / these trips?

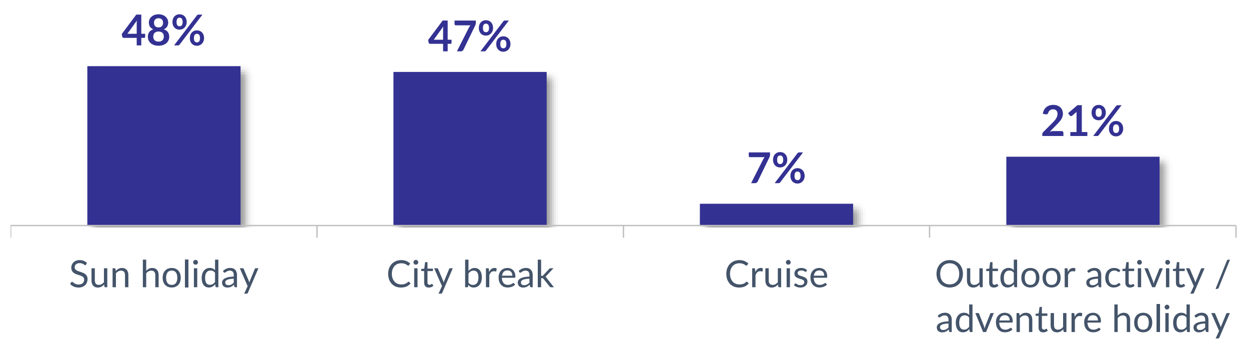
Looking **abroad** – intentions are growing, with pent-up demand as well as sun and VFM key factors here

33% of total sample are considering a break abroad in the next 3-4 months

59% of this cohort are actively planning or have booked their trips

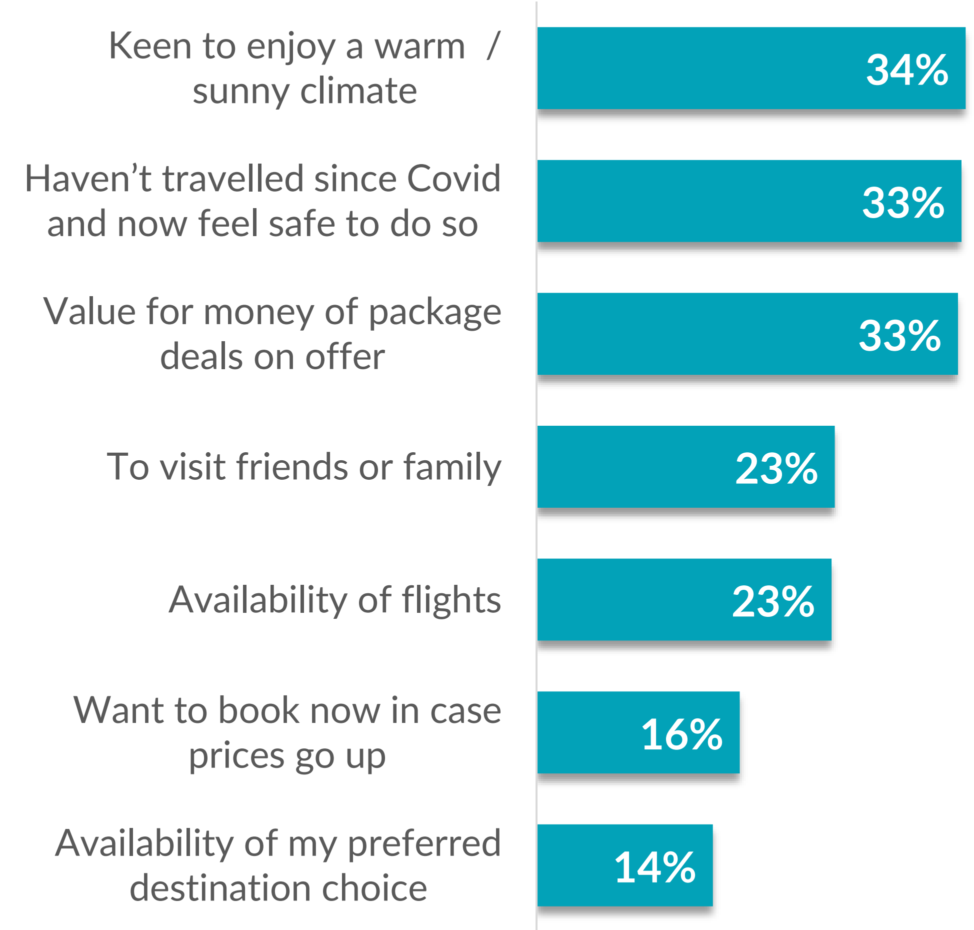
Strong growth in the number or people both considering and planning trips abroad – in November, **19%** of total sample were planning a break abroad

What type of trip are you considering?



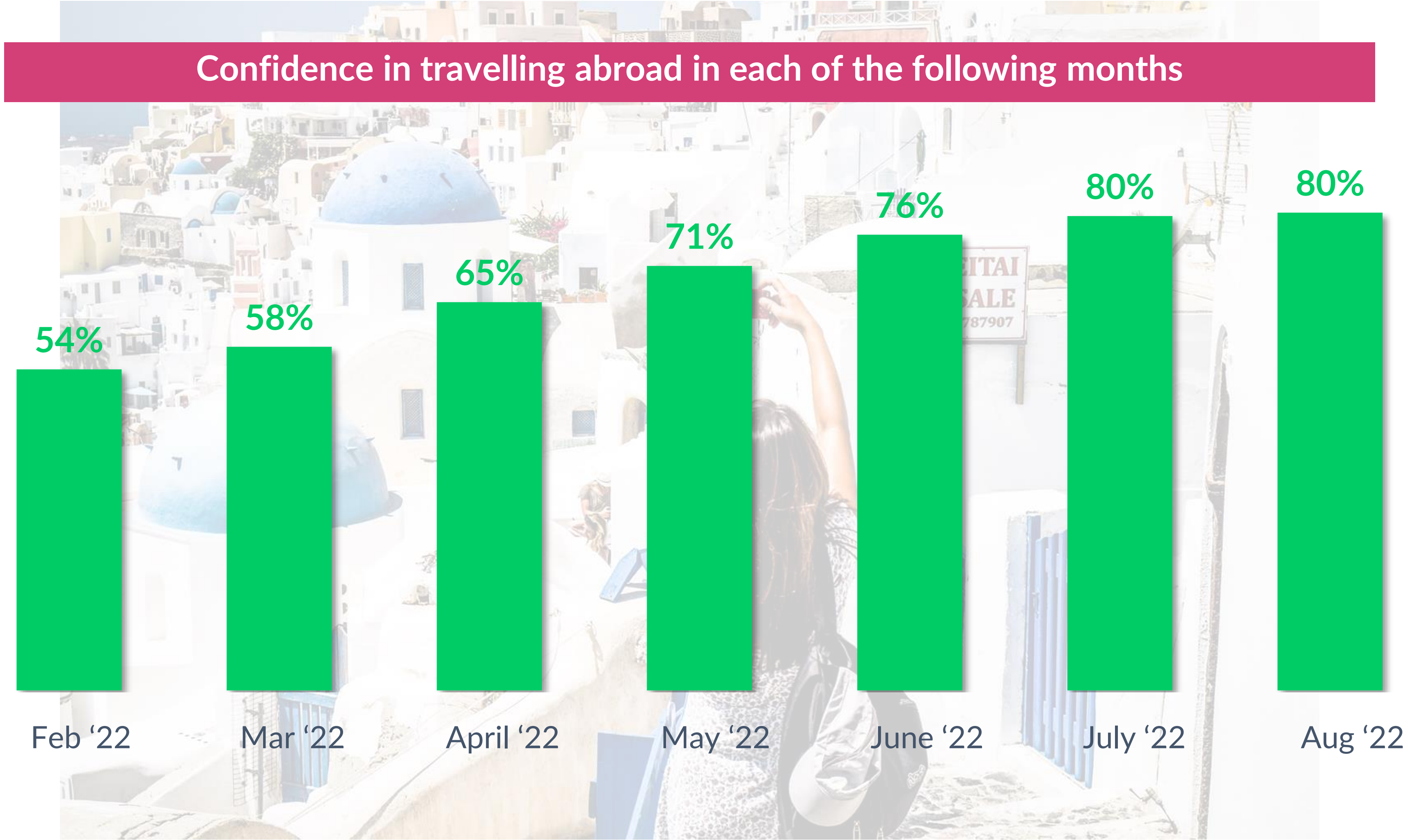
Base = 247 considering trip abroad

Reason to consider a trip abroad this winter/spring



E14. You mentioned that you are considering taking a break abroad in the next 3-4 months (i.e. between February and May). Have you booked or thought about planning this trip abroad? E15b. What has encouraged you to consider a holiday or short break abroad this winter / spring (February – May)? E15New. What type(s) of holiday or short break abroad are you considering?

Most expect summer trips **will not be cancelled** – the market for holidays abroad will likely grow considerably in coming months



Younger participants are more confident in being able to take a trip abroad in the shorter term
- 68% feel confident they could go abroad in March; 72% in April

Base = 750 total sample

E15c. How confident are you that you would be able to go on a holiday or short break abroad in the following months (i.e. you won't have to cancel)?

Market Comparison
Travel Intent

Higher confidence in ROI means travel intentions grow more than in NI

NI short break intent up **6%** in ROI; in NI this drops slightly by **3%**

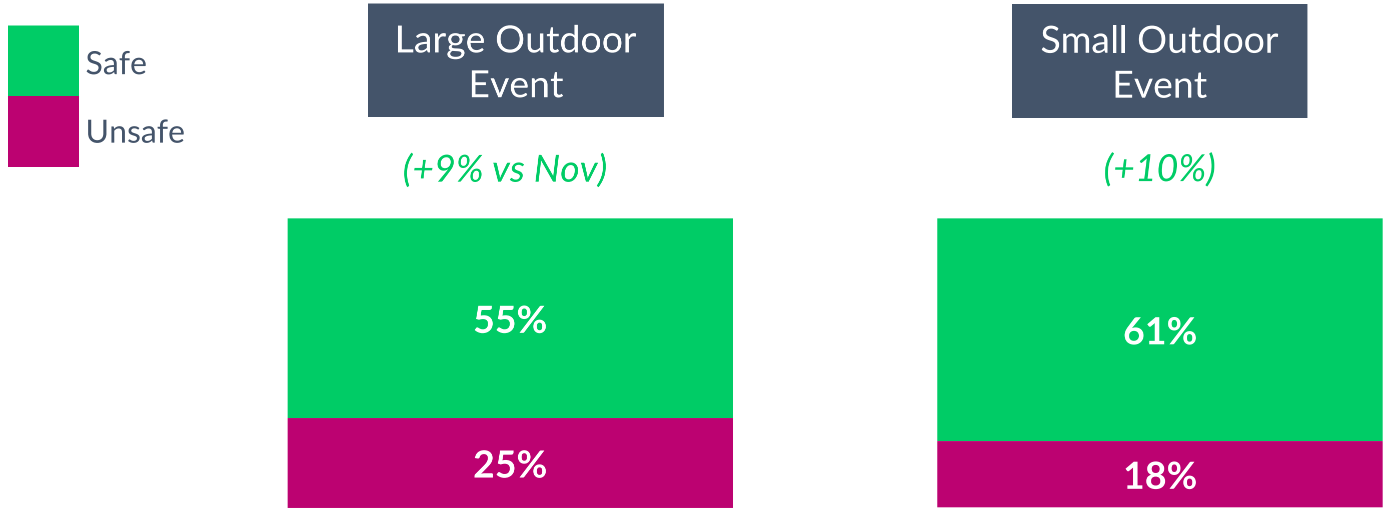
'Relax and unwind' remains top trip motivation in both markets

Travel abroad also less of a pull for those in NI – for now

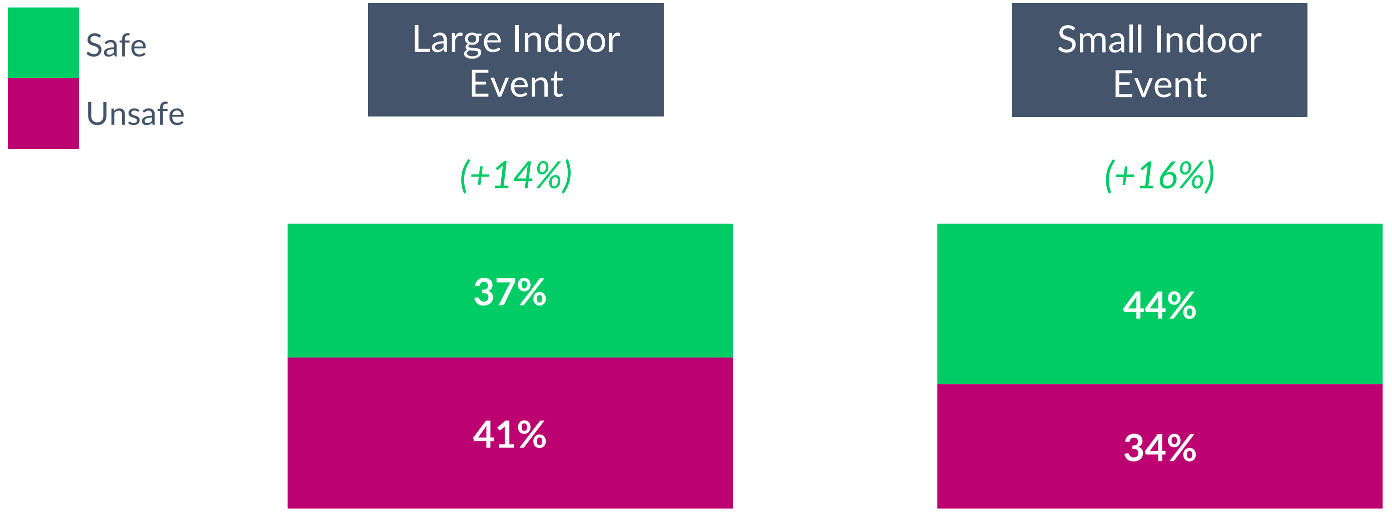
Long break intentions for trips abroad are **31%** and **36%** for spring and summer respectively. Compare this to **24%** and **21%** for NI. However confidence is growing significantly in both markets

Events

Perception of Safety this Winter - Outdoor Event



Perception of Safety this Winter - Indoor Event



Base n = 750

Confidence in indoor events sees a significant increase since Nov as restrictions lift

High net positive scores for outdoor events particularly

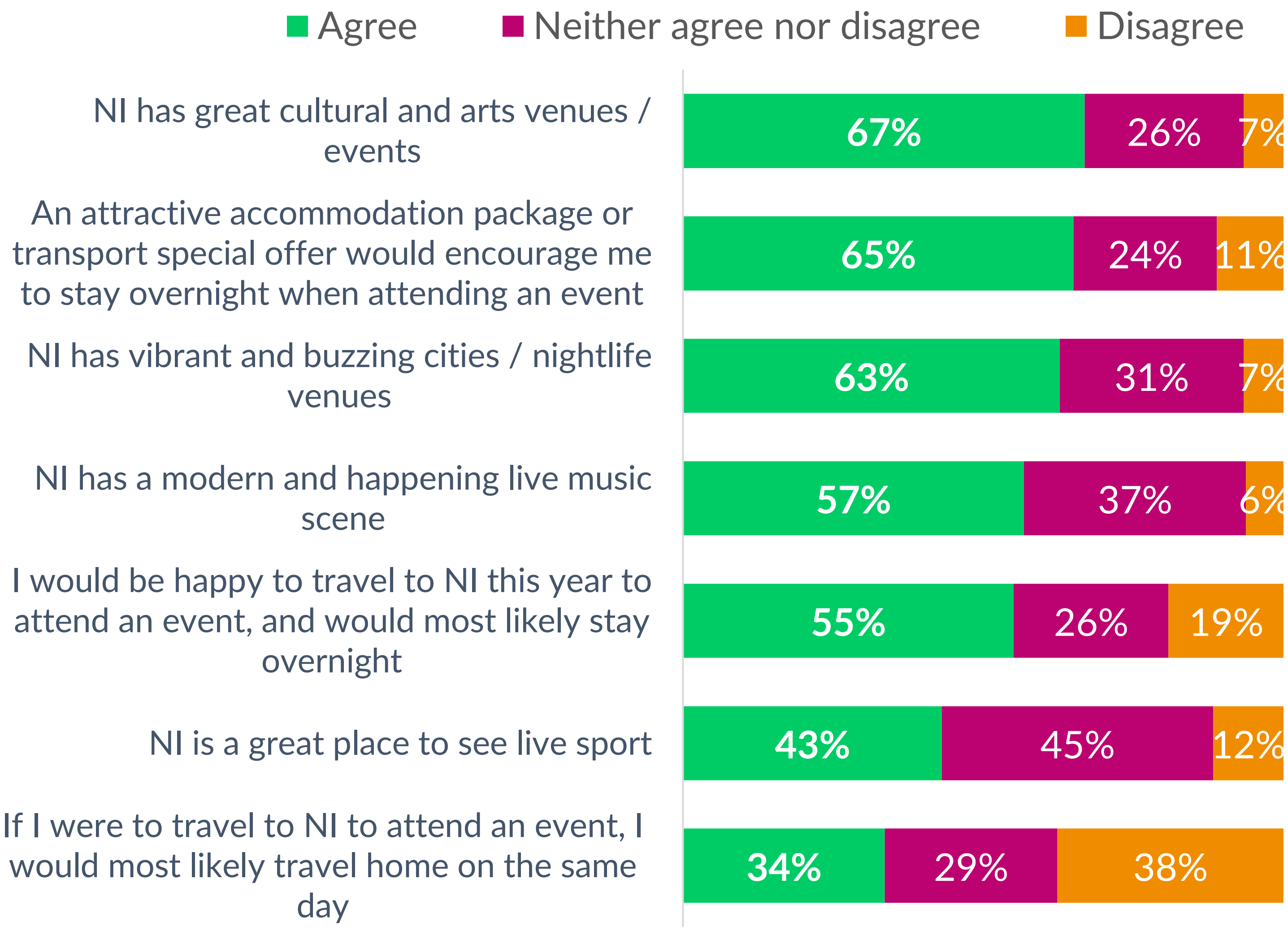
G1. How safe would you feel attending the following live event types in the winter / spring?

NI broadly seen as a great place for culture and nightlife by those in ROI

Very positive to see that more than half would consider attending an event and staying overnight this year

Base n = 750

NI agree statements



G10. Please state to what extent you agree or disagree with the following statements.

For more information, please contact: insights@tourismni.com