Consumer Sentiment

Covid-19

19 August 2020

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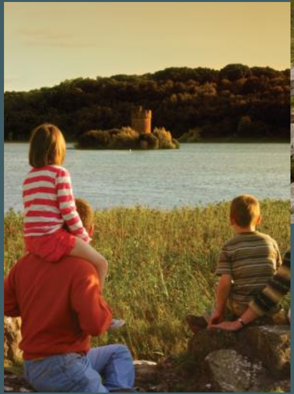

A return to normal?

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UK consumers perceptions of when things will return to 'close to normal'

'Later in 2021' is increasing its status as the most commonly selected option for expectations of normality returning. The proportion expecting normality by December has dropped, as expectation shifts to 2021

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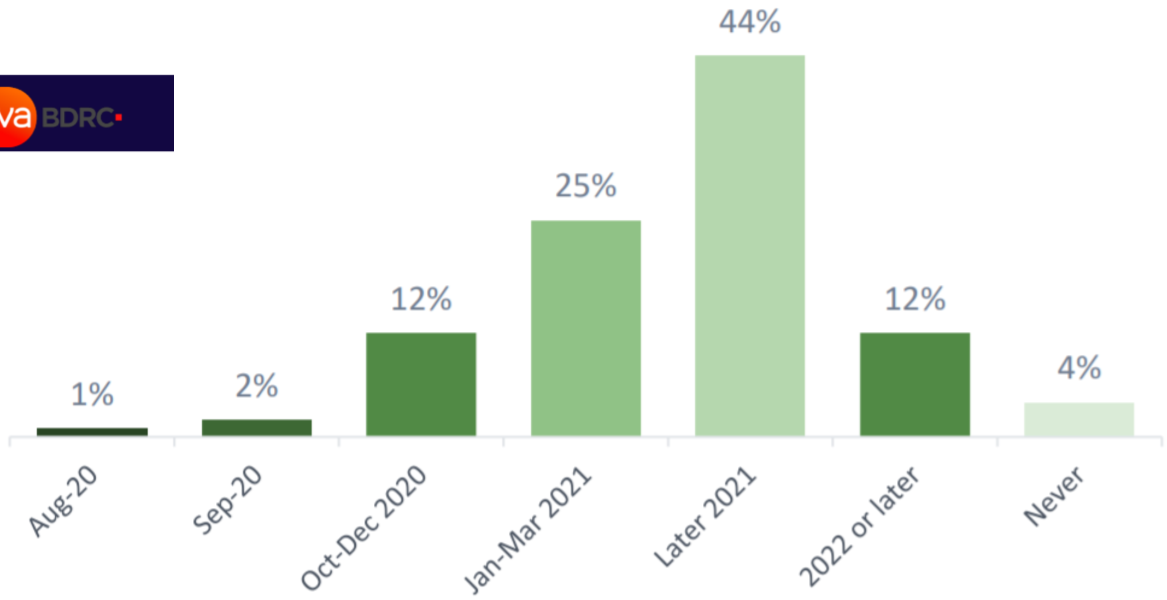

The Current Mood in NI and ROI

Consumers across both NI and ROI continue to be concerned about Covid-19 and how it is impacting them however whilst confidence in staying safe has risen, care in adhering to safety guidelines has dropped

- 43% of NI consumers in NI state that they are confident that they will stay safe by taking precautions and looking after their hygiene – an increase from 32% at the end of May
- Taking care in adhering to best practice behaviours such as social distancing and appropriate hygiene is cited by three out of four NI consumers

Travel – short breaks

- Just over half (53%) of NI consumers are planning to take a short break (1-3 nights) in Ireland in the next six months
  - 40% in NI
  - 66% in ROI
- 17% are planning to take a short break abroad over the same period of time
  - 31% in NI
  - 66% in ROI
- Hotels continue to be the preferred accommodation type for short breaks (52%) followed by self-catering (paid) (29%) (51% for 25-34 yr olds)
- Intended short trips are predominantly planned with a partner (42%) and with immediate family (partner, children) (43%)

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Travel – day trips and outings

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- 56% of NI consumers are planning to take a day trip/ outing – 19% stated they were not, however 25% were 'don't knows'

- 70% of 25-34 year olds are currently planning a day trip – less risk averse age group

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Travel Intentions

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- August, September and October continue to indicate high levels of intent to take a break with couples (over 45) more likely to travel in September compared to other age groups
- The research continues to show that 3 in 5 breaks are as a replacement for a break abroad - long breaks abroad are being replaced with short breaks in Ireland
- 23% intend to take a longer break in Ireland in the next 6 months
- However, of those who intend to take a break in Ireland– just over a third (35%) have booked (up from 20% at the end of May, 25% end of June)

Type of Destination

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Type of destination for next U.K. short break or holiday

- 'Countryside or village' (36%) stays ahead of 'traditional coastal/seaside town' (32%) as the main destination type for a trip by September. 'Rural coastline' and 'city or large town' (both 22%) are the next most preferred destination types although significantly less so
- Between October and March, 'city or large town' (31%) is the most preferred destination type, significantly more so than before October, whilst 'countryside or village' and 'traditional coastal/seaside town' both see significant drops

Figure 28. Main type of destination for trip by September, Percentage Weeks 10-12 merged data, UK

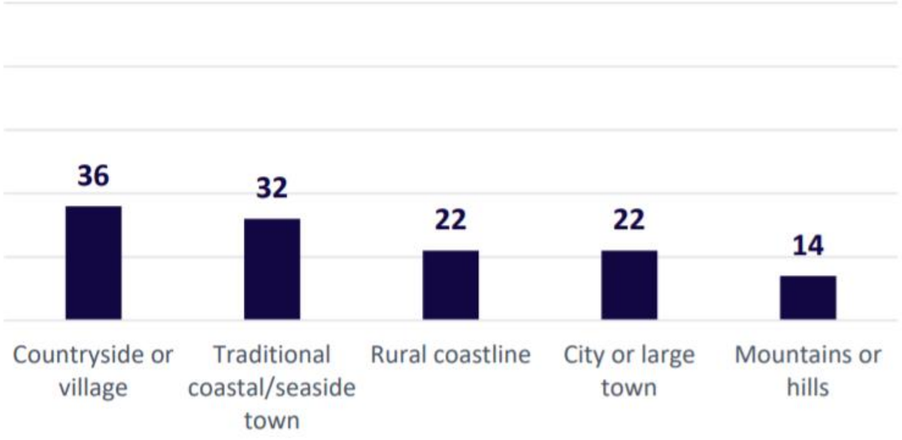
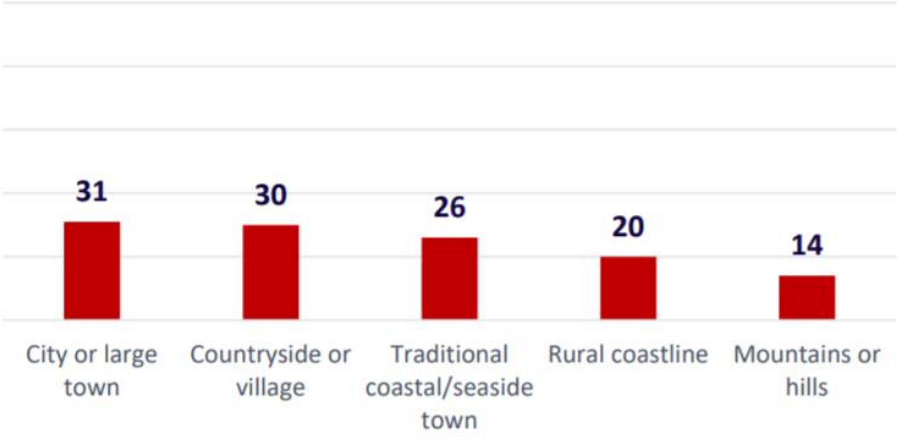


Figure 29. Main type of destination for trip from October to March, Percentage Weeks 10-12 merged data, UK



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 2/3 of households have already experienced a loss of income or expect to in the future
- 62% of NI households have or will be impacted
- Just over three out of 10 (32%) 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
- However, only 16% of 35-44 year olds have not been impacted
- Value for money continues to be important in consideration for both markets

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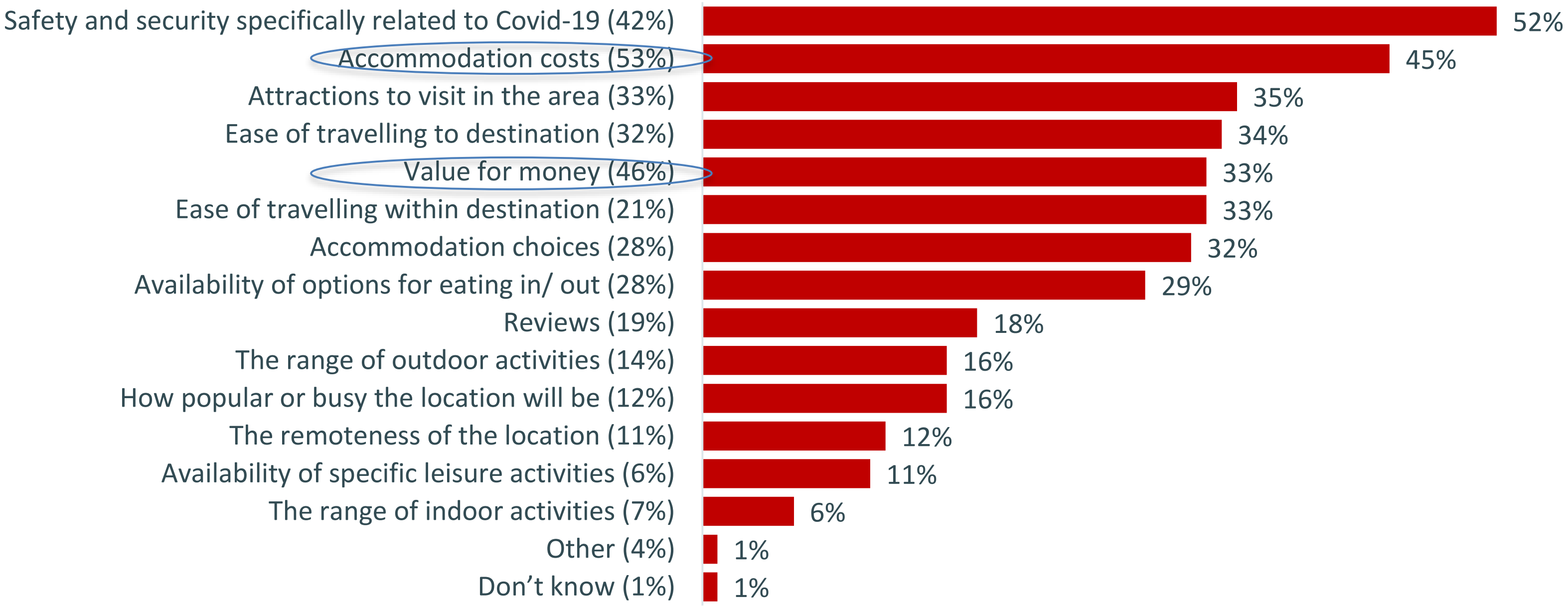
Key Considerations

Where cost of accommodation and value for money perception had overtaken safety and security as top considerations, this situation has now reversed – attractions to visit in the area has seem a small increase (2%)



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Price Expectations

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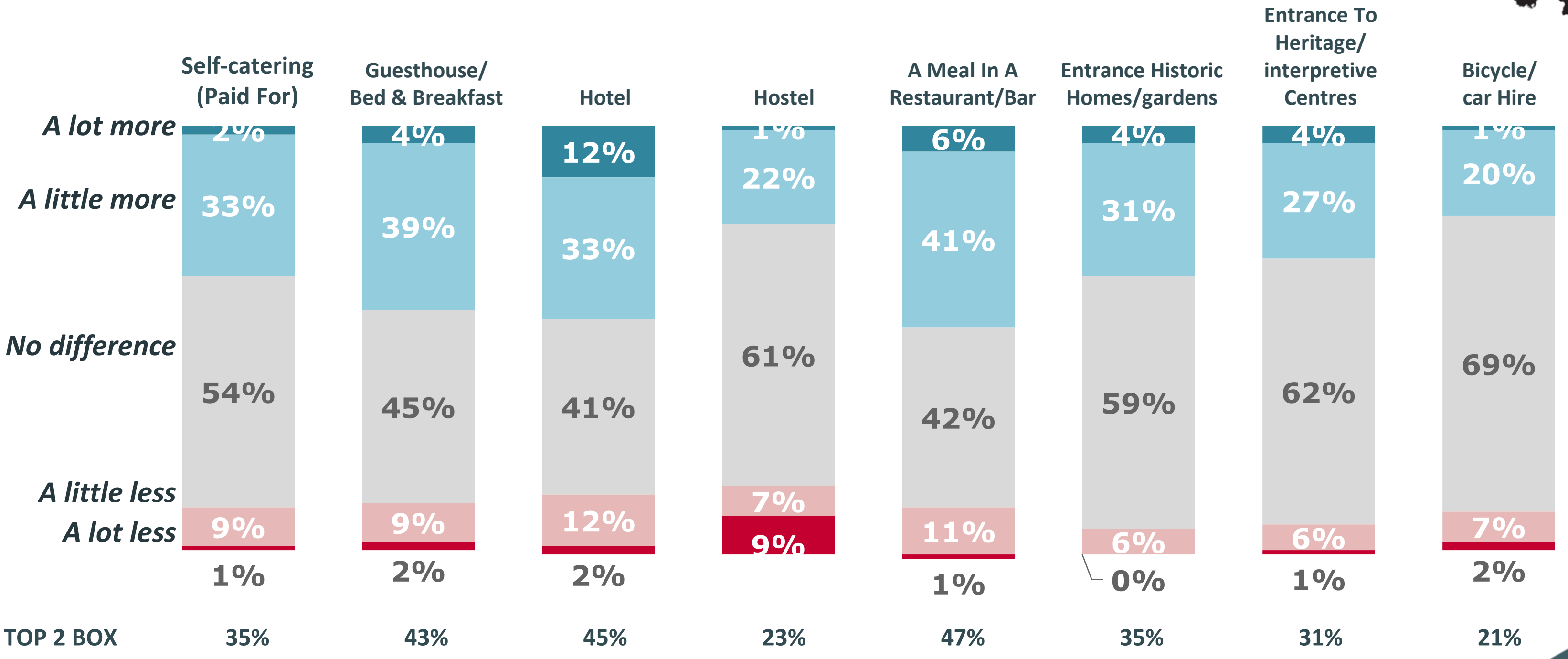
Over half of NI residents who are planning a trip do not EXPECT to pay more for their accommodation, hospitality and entrance fees. Since the end of June wave, those planning a trip expect to pay more for accommodation of all types



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Prepared to Pay More?

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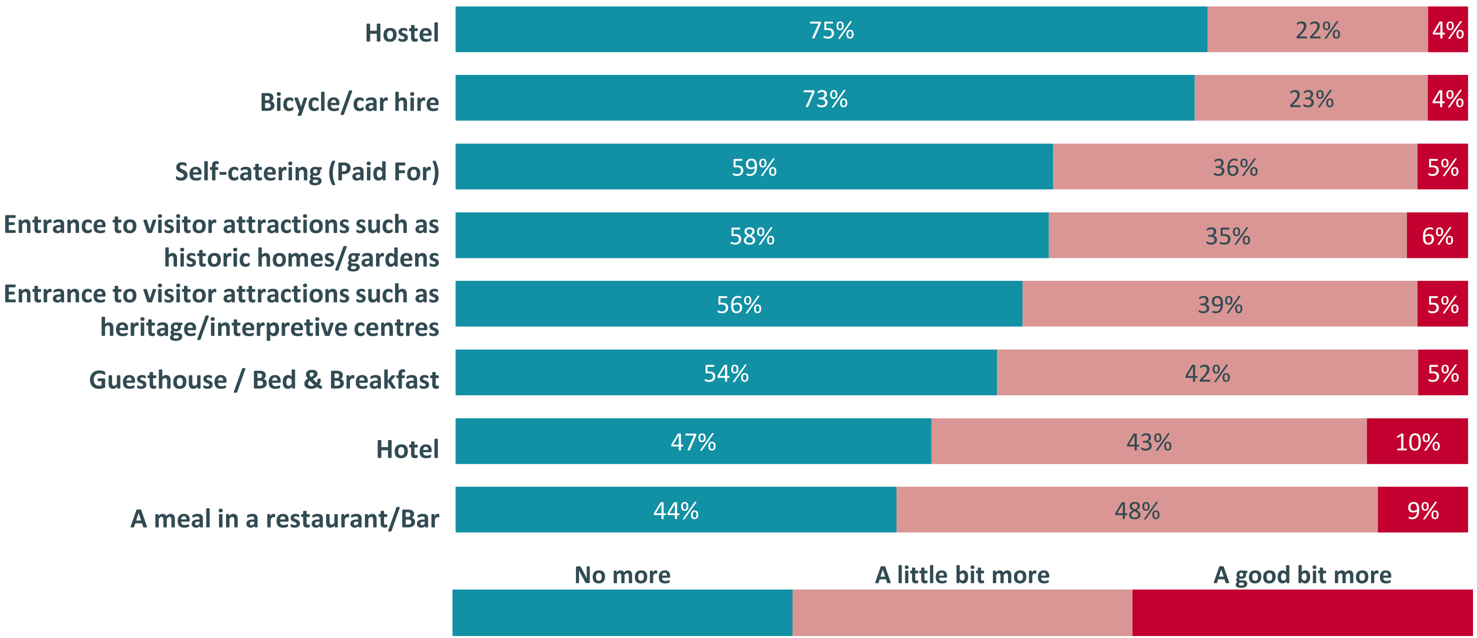
Over half of those from NI planning a trip across the island of Ireland are still not PREPARED to pay more either – similar to sentiment at the end of June



Travel activity in the past month

- 51% of NI consumers have undertaken some type of trip in NI in the past month (up to 20 July) and 24% in ROI – predominantly leisure trips – 25-34 yr olds most likely
- Short breaks to ROI have been more prevalent than within NI, whilst short trips close to home and further afield day trips in NI have been popular

	In ROI	In NI
Short trip (up to 20km from home)	9%	39%
Day trip (more than 20km from home)	8%	28%
Short Break (1-3 nights)	12%	8%
Long Break (4+ nights)	6%	4%
None of the above	76%	49%

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Consumer Needs

After being in lockdown and having had movement restrictions, the most important reasons for taking either a short trip for consumers in NI remain the same …..

….. with enjoying great food and drink becoming increasingly important (21% in June)

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Appeal of activities and attractions

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For those from NI who intend to take a short trip in Ireland, overall, activities that take place outdoors and outdoor attractions are more appealing than indoor attractions

Clear, visible implementation of hygiene measures and social distancing enforcement are the key actions that would make consumers feel most comfortable –We’re Good to Go will be very important

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In summary

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Consumers across both NI and ROI continue to be concerned about Covid-19 – safety and security are still important but there is a slight drop in adherence to the guidelines. 'Later in 2021' is when most in the UK expect normality to return

Travel intentions suggest a more optimistic outlook is emerging, particularly in relation to domestic short breaks where 53% of NI consumers are planning a short break in Ireland in the next six months – 8% have already taken a short break in NI

Booking has been slowly following intention to take a break, with a 1/3 having made a booking

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

The pandemic has had and continues to 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 – the majority are not prepared to pay more

In summary

Day trips are popular with the 25-34 year old, less risk averse, age bracket
Escaping, relaxing and having fun are what people want to do on their future break – enjoying good food and drink have become more important – communication of how this can all be combined safely is key
Outdoor attractions and activities are high on people's wish lists
Cities and large towns will be the preferred destination come the autumn
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 customers feel most comfortable – 'We're Good To Go' will be very important

Consumer sentiment research and insights

available on

www.tourismni.com

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