

Consumer Sentiment

Covid-19
22 July 2020



tourism
northernireland



The Current Mood

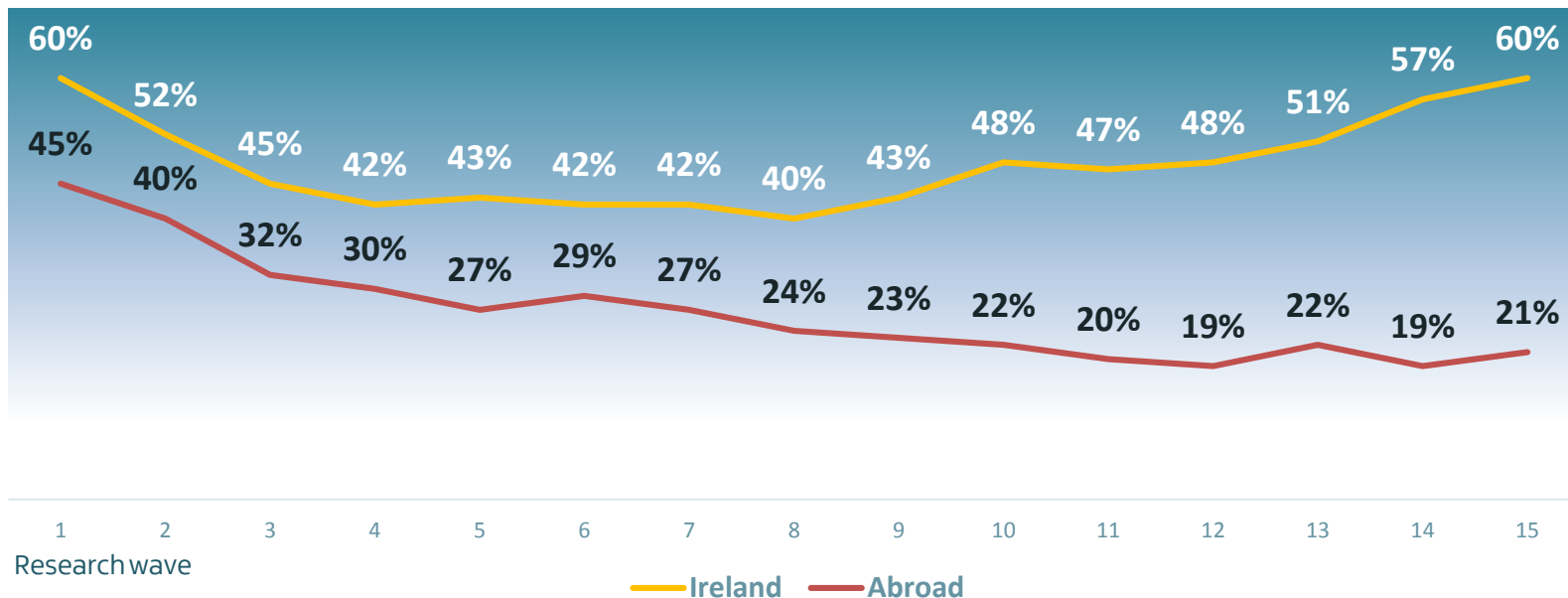


Consumers across both NI and ROI continue to be concerned about Covid-19 and how it is impacting them however whilst confidence in staying safe has risen, care in adhering to safety guidelines has dropped

- Four out of 10 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. However, over half (52%) of ROI residents are confident about staying safe
- Care in adhering to best practice behaviours such as social distancing and appropriate hygiene have seen a drop in both NI (78% to 72%) and ROI (70% to 63%)
- NI consumers are now slightly more worried about falling sick than their ROI counterparts

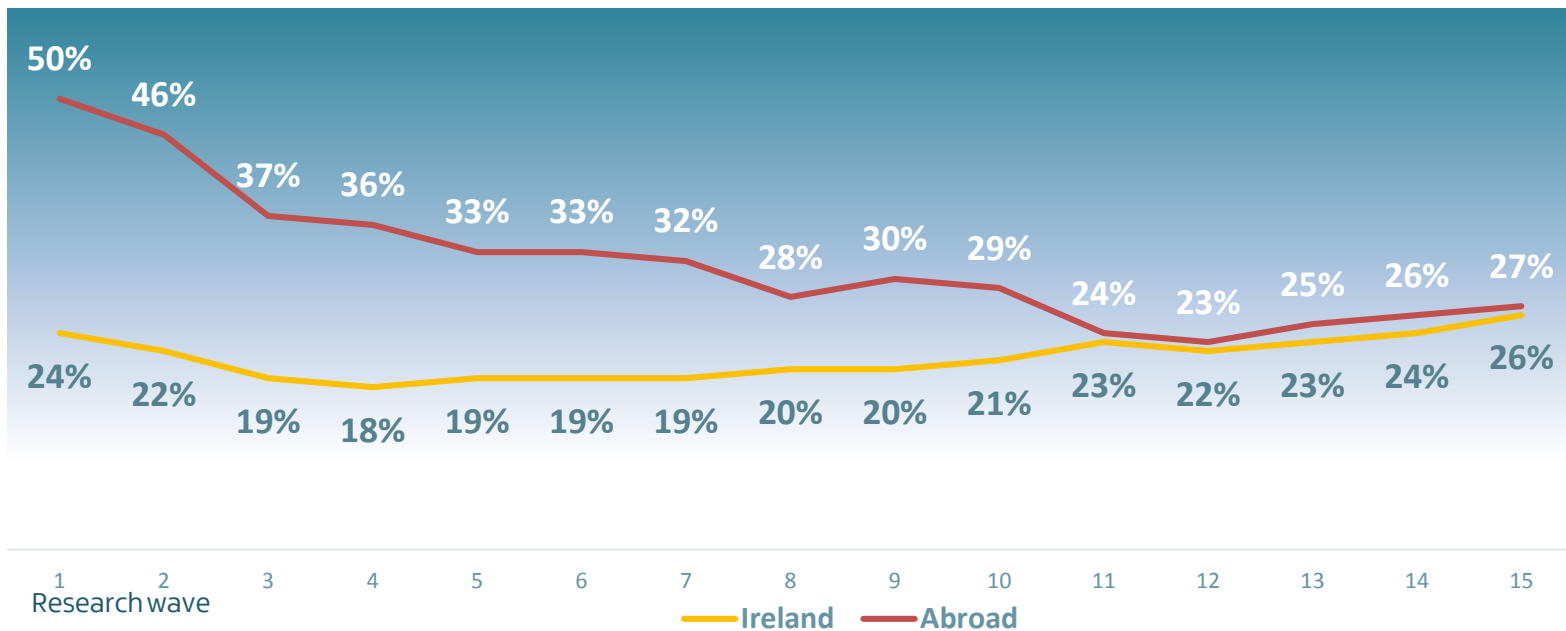
Travel Intentions – short breaks

Short break intention has picked up over the month of June from 51% to 60% 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 - 1 in 5 would normally take a trip between June –Dec but not this year.



Travel Intentions



- August, September and October indicate high levels of intent to take a break with couples (over 45) more likely to travel in Sept compared to other age groups
- 40% will only travel on the island of Ireland in 2020
- Around 3 in 5 breaks are as a replacement for a break abroad
- Long breaks abroad are being replaced with short breaks in Ireland
- However, of those who intend to take a break – a ¼ have booked (up from 1/5 at the end of May)
- 26% have not planned any trips
- Hotels continue to be the preferred accommodation type (55%) followed by self-catering(paid) (27%)
- Intended short trips are predominantly planned with a partner (43%) and with immediate family (partner, children) (33%)



The Financial Impact of Covid-19



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

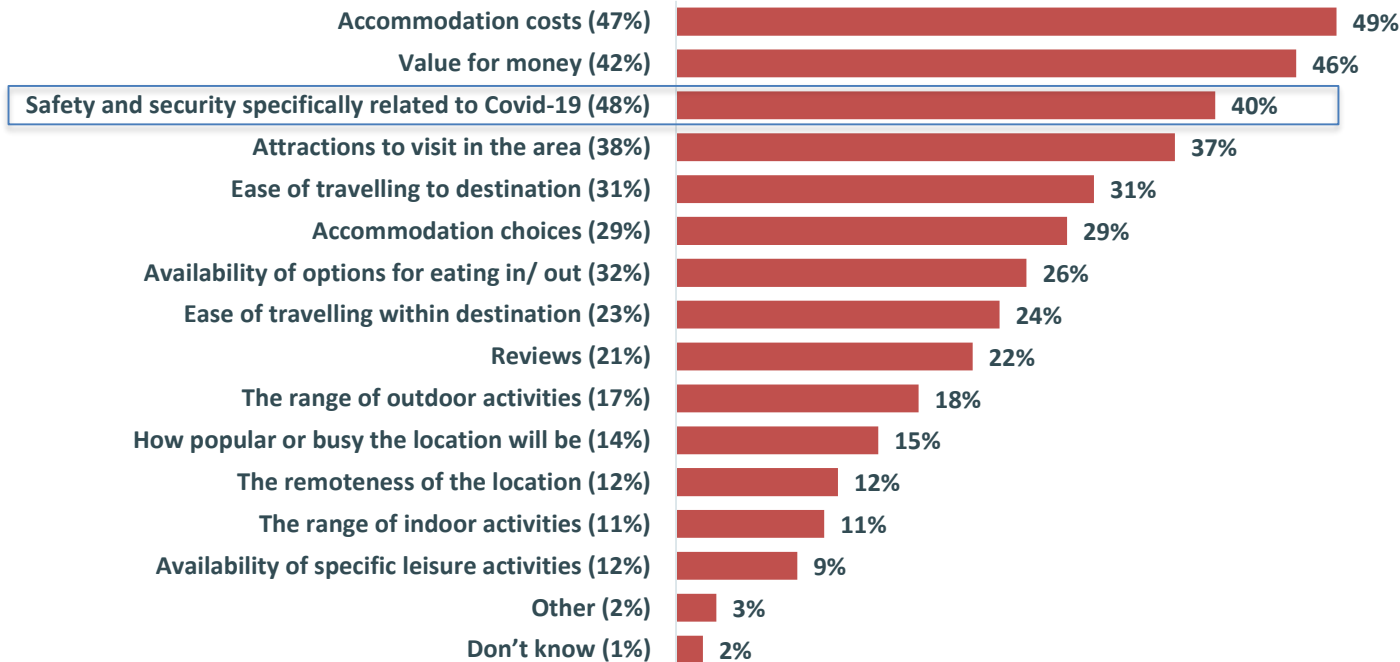
- Across the island of Ireland over 2/3 of households have already experienced a loss of income or expect to in the future
- 62% of NI households have or will be impacted and a slightly higher proportion (67%) are affected in ROI
- Just over three out of 10 (32%) in NI state that Coronavirus will have no impact on their household income with the 65+ age band and those in higher socio-economic groups state are less impacted than average – this is the case for 28% of ROI households
- Value for money will therefore continue to be important in consideration for both markets



Key Considerations

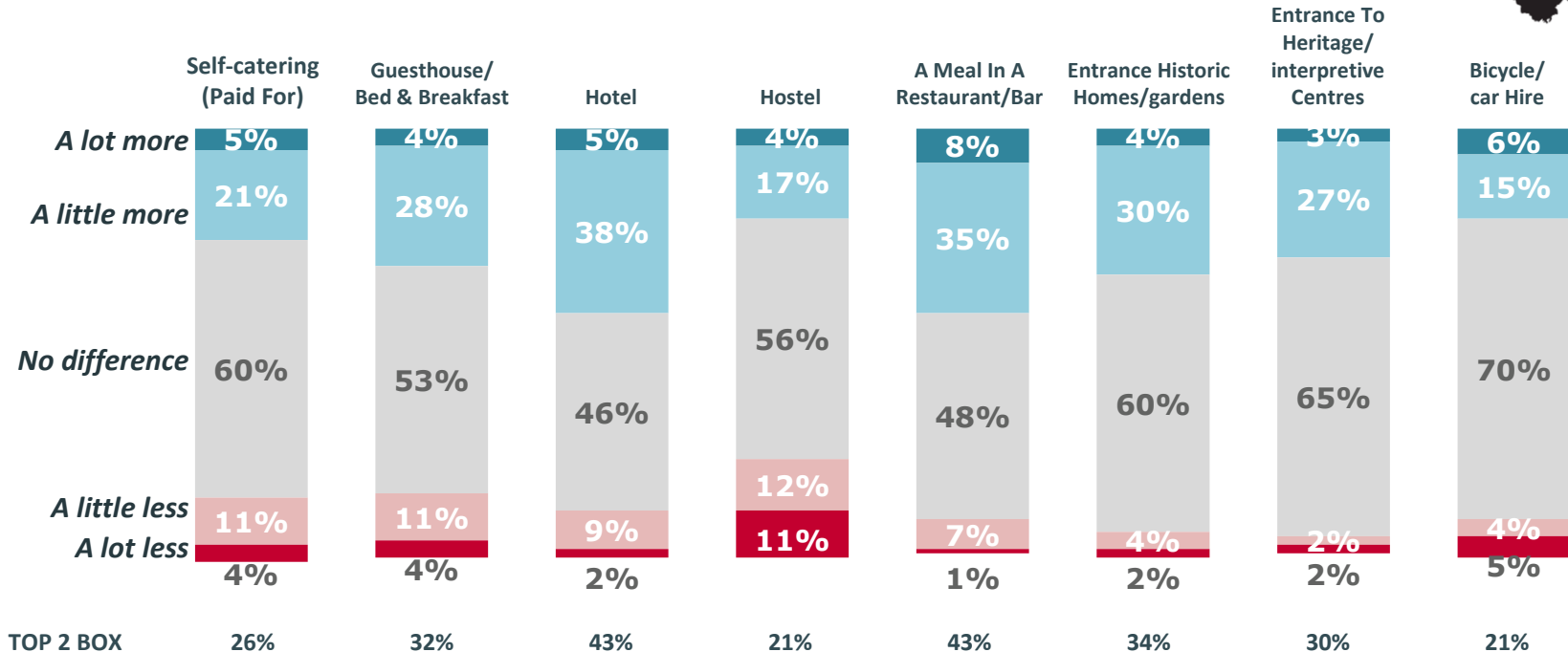


The cost of accommodation and value for money perception have now overtaken safety and security as top considerations since the end of May



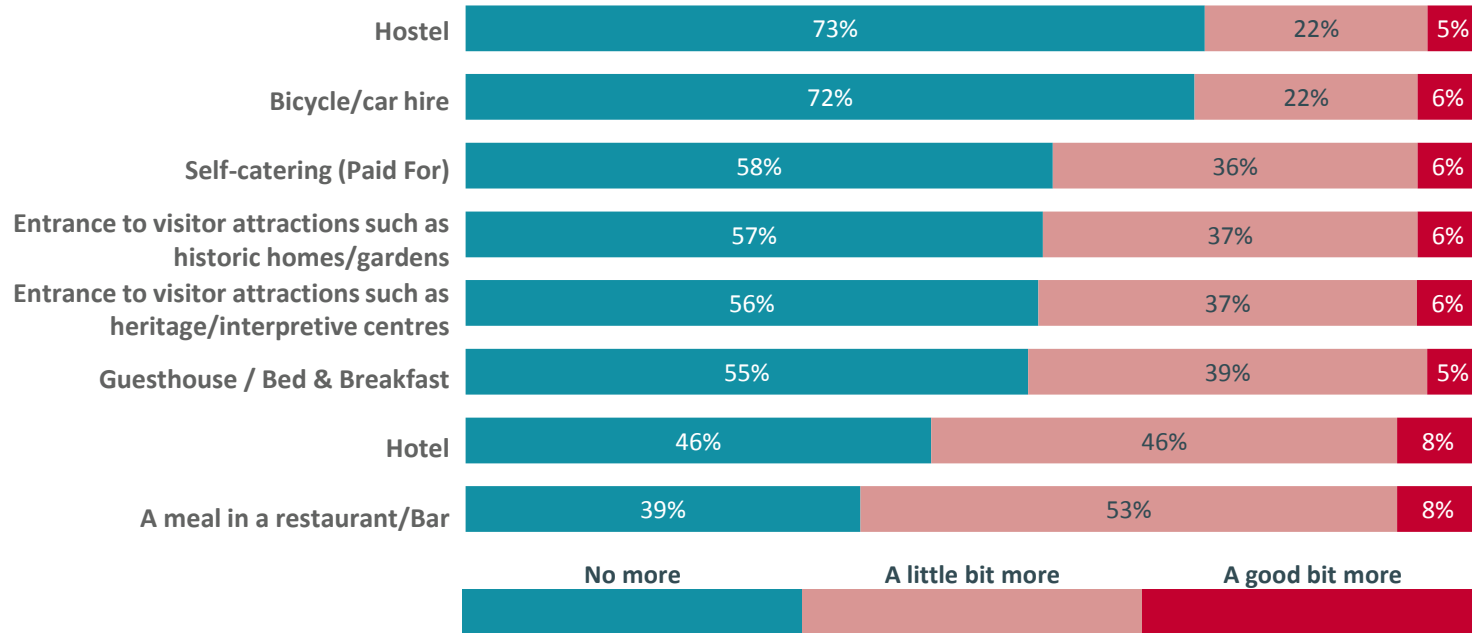
Price Expectations

Over half of NI residents who are planning a trip do not EXPECT to pay more for their accommodation, hospitality and entrance fees



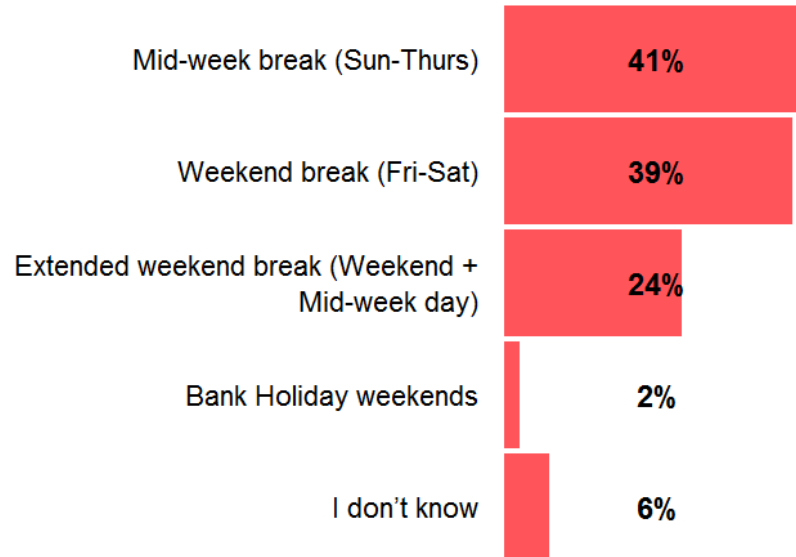
Prepared to Pay More?

Over half of those planning a trip across the island of Ireland are still not **PREPARED** to pay more either although there has been a small increase in the proportions who would pay a little bit more since the end of May



Type of short break

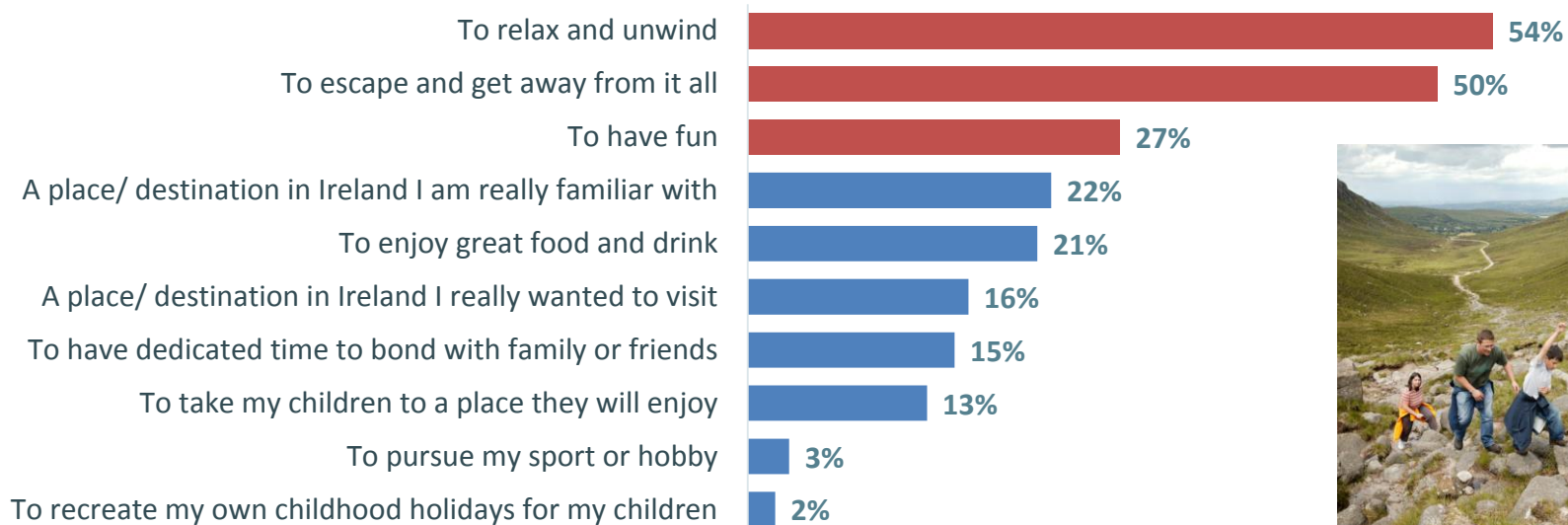
NI residents intend to take mid week and weekend breaks:



Consumer Needs



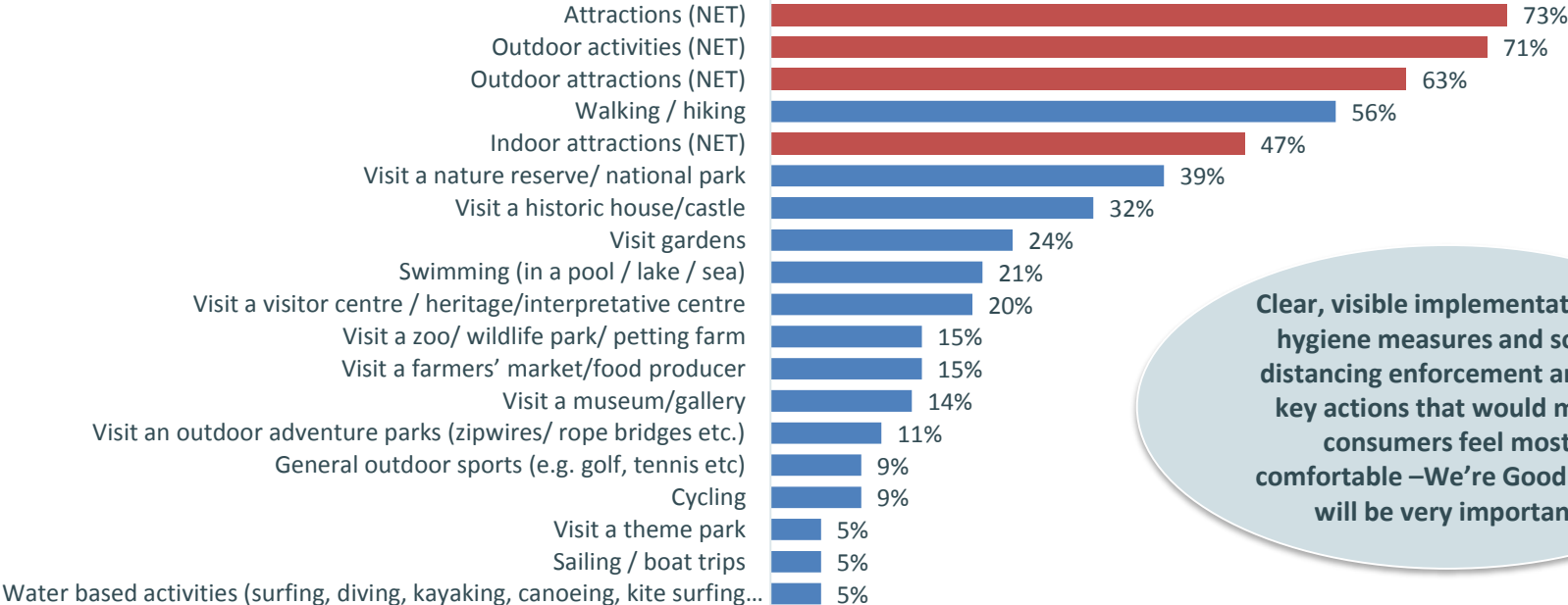
After lockdown and movement restrictions, the most important reasons for taking either a short trip for consumers in NI are



What will they want to do?



For those from NI who intend to take a short trip in Ireland, the outdoors and historical and cultural visits are high on the list



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

In summary



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

Travel intentions suggest a more optimistic outlook is emerging, particularly in relation to domestic short breaks where 60% of NI and ROI consumers are planning a short break in Ireland in the next six months – mid week breaks will be popular

Booking is only slowly following intention to take a break, with a ¼ having made a booking

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

The pandemic is already having/ 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 – the majority are not prepared to pay more

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

Outdoor attractions and activities are high on people's wish lists

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
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