# Consumer Sentiment
# NI Market
# December 2021 Report

tourism northernireland

SPARK
The Strategic Insight Agency

# Research background

# Research Background & Objectives

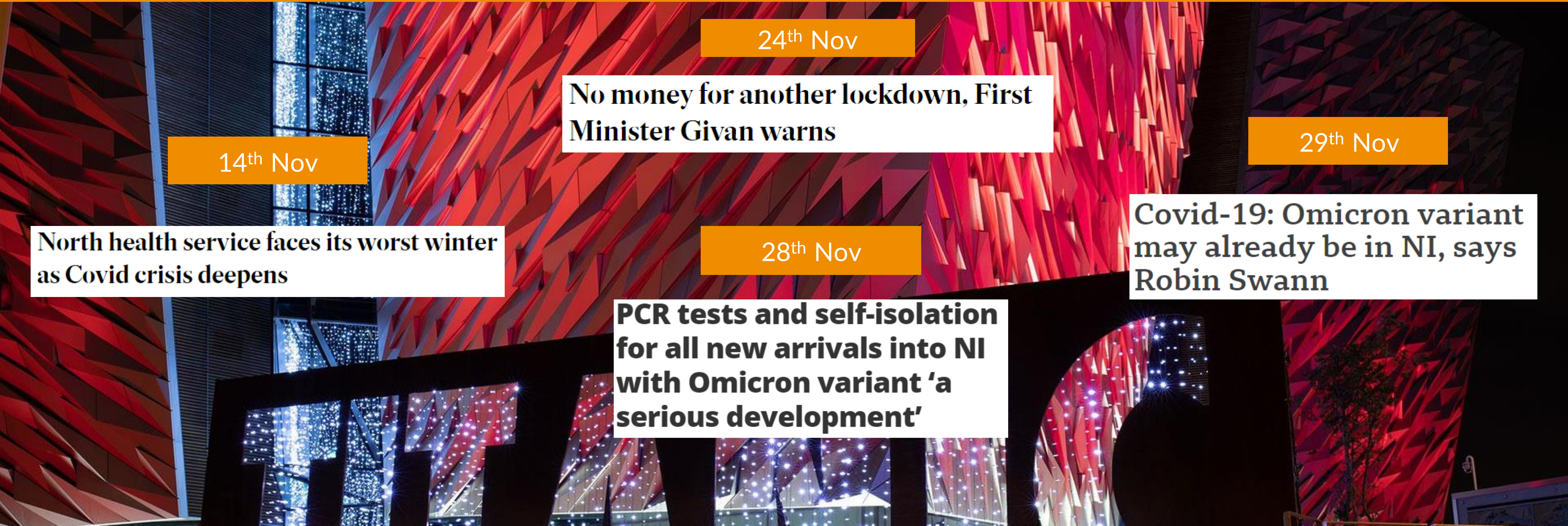
This is the 6th wave of our consumer sentiment barometer for Northern Ireland (NI). We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how things are changing as Covid cases rise.

**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?

FW Dates 11th Nov – 1st Dec 2021



14th Nov

North health service faces its worst winter as Covid crisis deepens

24th Nov

No money for another lockdown, First Minister Givan warns

28th Nov

PCR tests and self-isolation for all new arrivals into NI with Omicron variant 'a serious development'

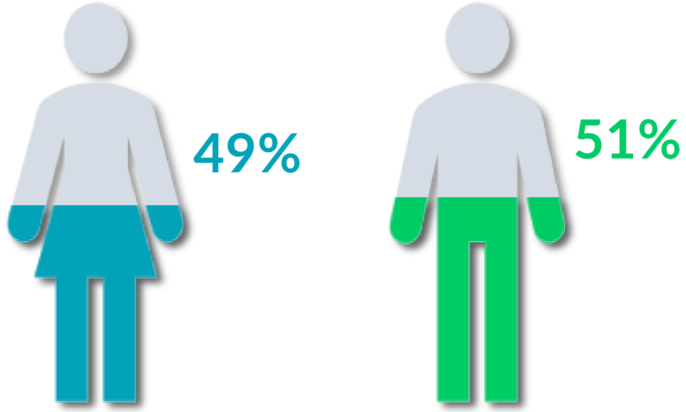
29th Nov

Covid-19: Omicron variant may already be in NI, says Robin Swann

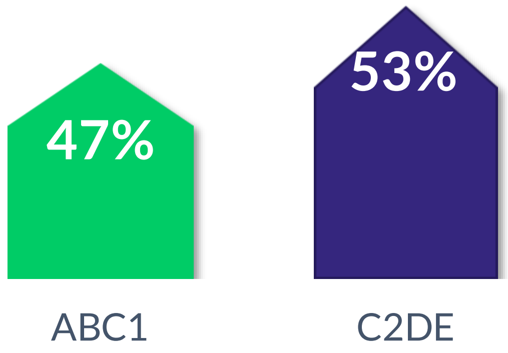
# We interviewed a robust, nationally representative sample in Northern Ireland

Total sample = 400

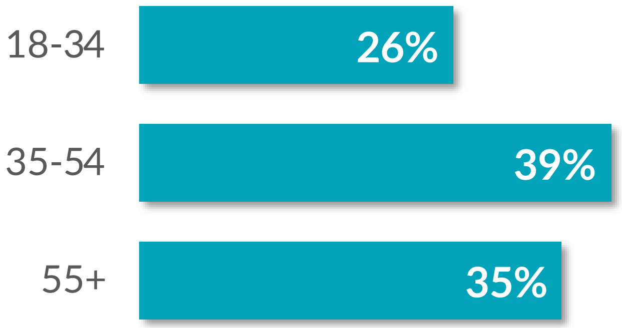
## Gender



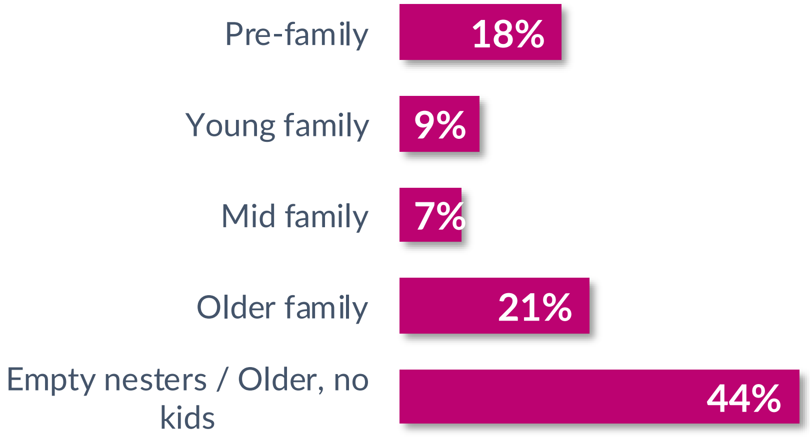

## Social Grade



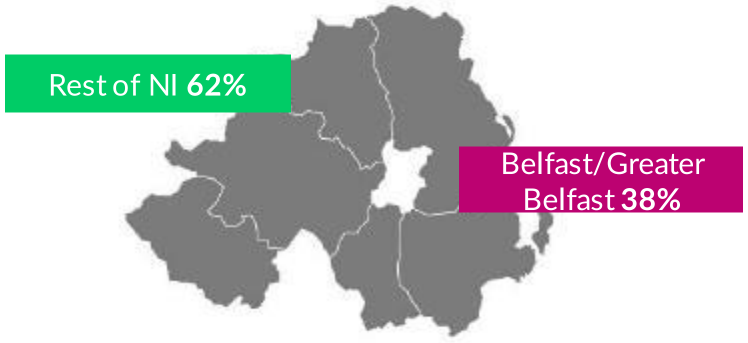

## Age




## Lifestage




## Region




Base n = 400

# Key Takeaways

**Less palpable sense of nervousness about Covid than in ROI**

- While the number saying the worst is still to come has increased against the previous wave of research, there is more optimism in NI that things will stay the same.
- Levels of anxiety also not hit, and those who travelled in NI much happier with Covid-security of where they were staying.
- **N.B. Important to note media coverage relating to the Omicron variant did not emerge until the latter stages of the research.**

**Less nervousness/anxiety means good news for travel intentions**

- Perceptions of NI as a safe place for a trip have not been damaged at all.
- Indeed, travel intentions in NI go up for short and long breaks, with most of these concentrated in February/March - boding very well for early 2022.
- Staycation intentions are now in line with ROI intentions to holiday in ROI.

**But important not to lose sight of security and cancellations**

- While Covid concern does not go up, increases in possibility of trip cancellations does.
- Alongside a Covid-secure environment, flexible bookings are an important consideration for those planning trips.

**Quality remains a strong asset for NI staycations**

- While value for money & Covid-security remain the key triggers for a short break in NI, quality features heavily both in factors for consideration and things that people rated positively about trips.

# Covid-19 and tourism

# Number saying worst is still to come climbs with Covid spike, although most still think things will stay same / worst has passed

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


**More negative outlook** among **mid-/ older family** (43%) and **older, no kids** (46%)

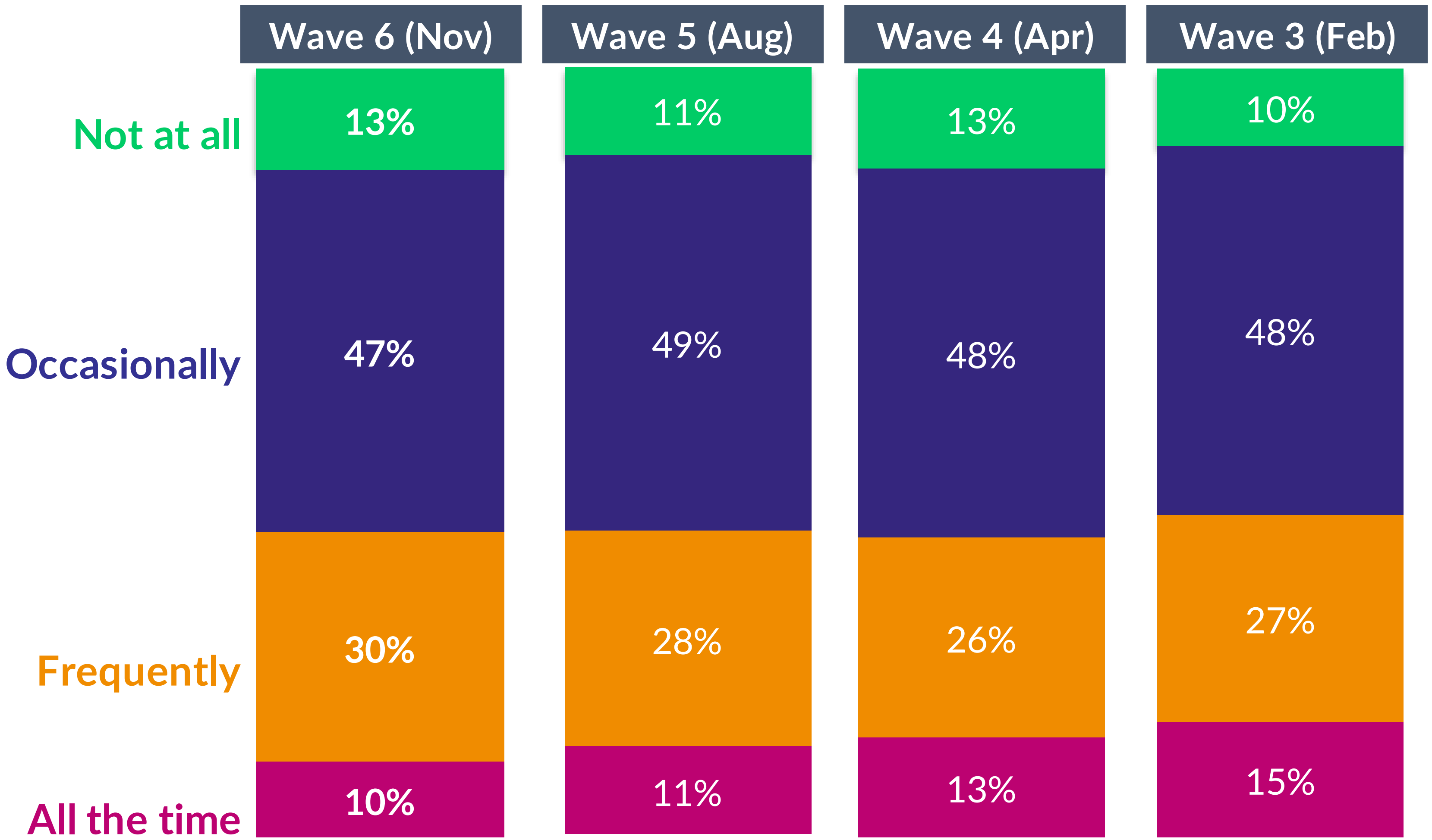
**More positive outlook** among **pre-family** (31%)

Base n = 400

A1a. Regarding the situation of Coronavirus/Covid-19 in Northern Ireland and the way it is going to change in the coming month, which of the following best describes your opinion?

# No change in anxiety levels despite rise in cases

**Stress / anxiety levels during Covid**




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

- **Females** 47%
- **18-34** 47%
- **Pre-family** 45%

Base n= 400

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

# Market Comparison
## Covid-19 & Tourism

**Greater sense of nervousness about the Covid situation in ROI than NI**

**49%** in ROI think the ‘worst is still to come’ – in NI, this figure is much lower, at **38%**

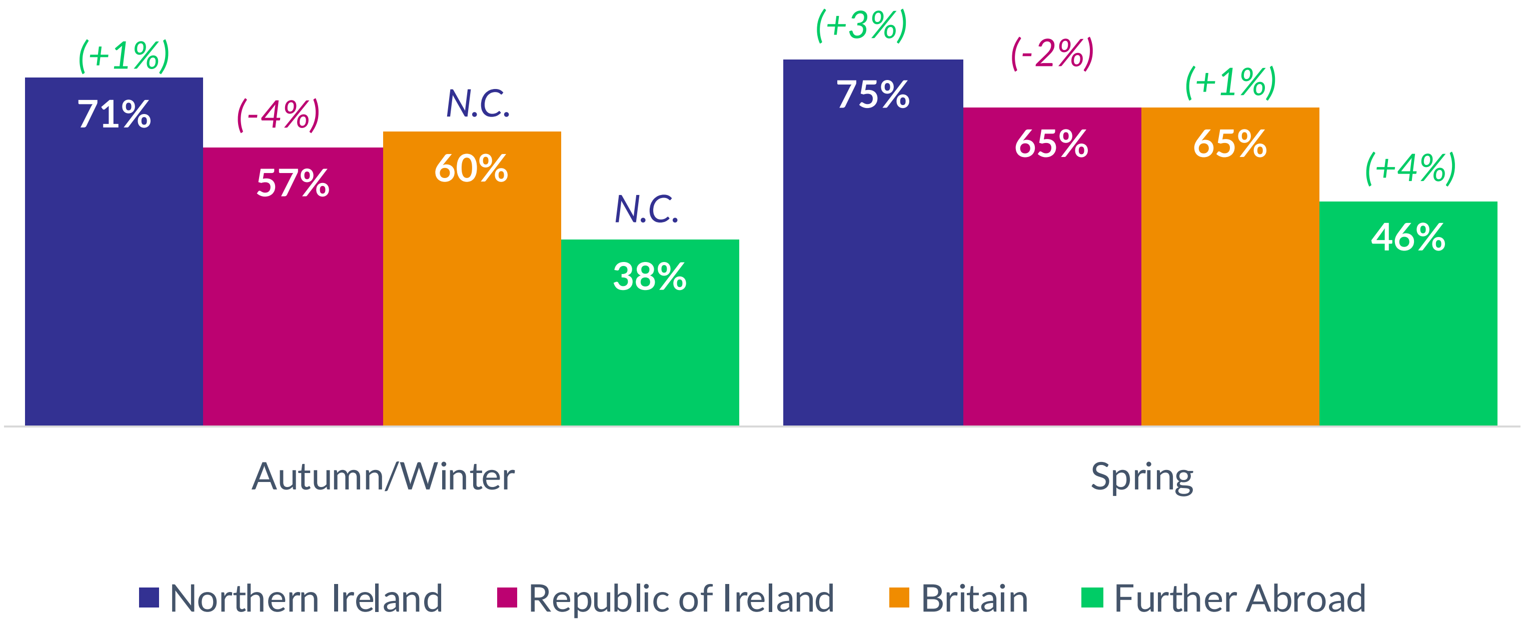
**However, positive that neither market sees a significant rise in anxiety**

**36%** feeling anxious ‘frequently / all the time’ in ROI and **40%** in NI – both in line with figures from August

# Current attitudes towards travel

# Safety perceptions of NI **not hit by Covid**, with ROI down slightly

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




Base n= 400

B1. How safe do you think it would be to take a holiday or short break in each of the following locationsduring the autumn / winter months? / B2. How safe do you think it would be to take a holiday or short break in each of the following locations during the spring months?

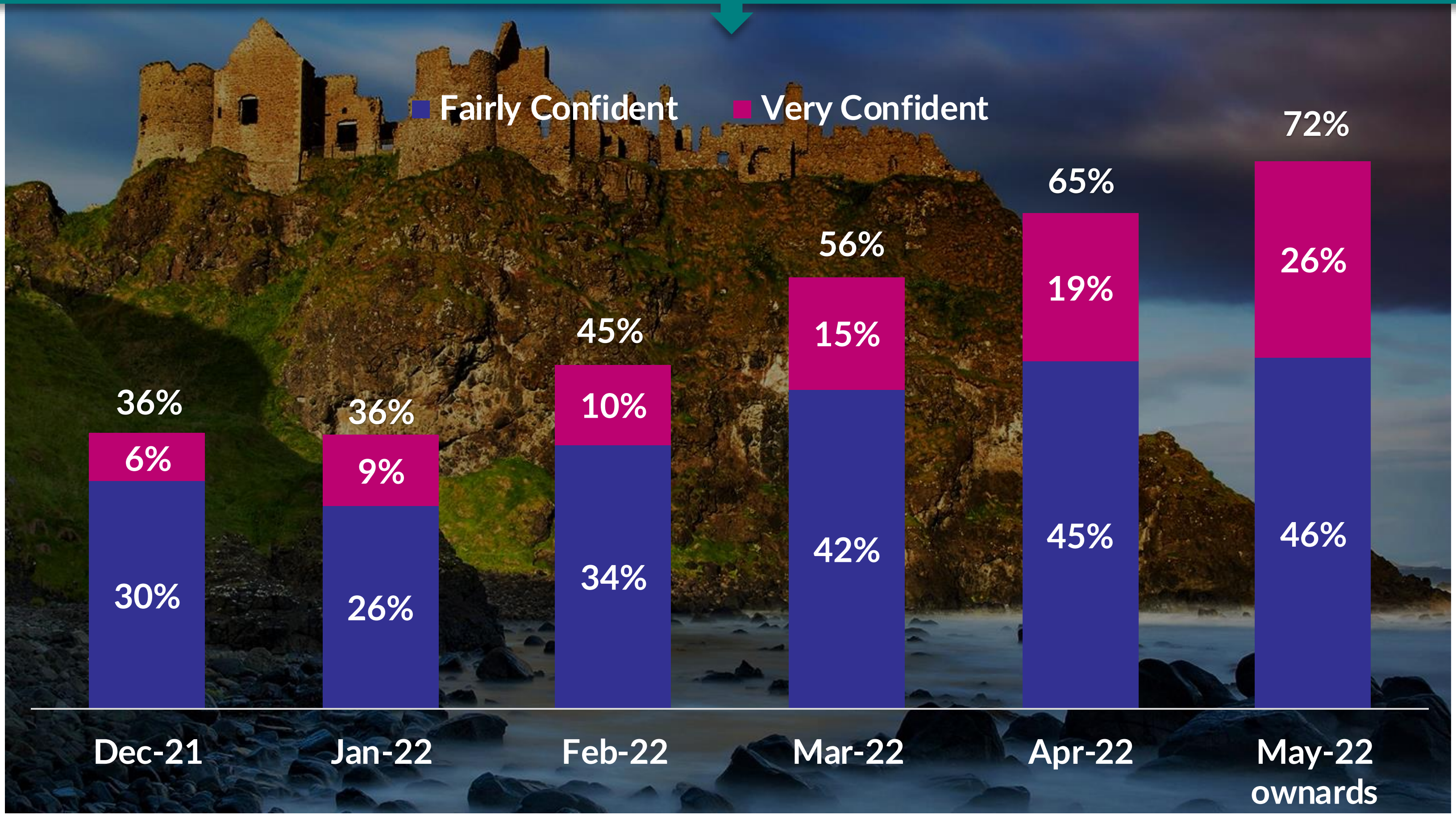
# Expect travel to pick up from **February onwards** – with high levels of confidence to travel in spring

**36%**
would be confident in a holiday on IoI this month

W4 (April): **26%**
W5 (August): **51%**

Down vs. August but still much better than in April – and rises from February onwards

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

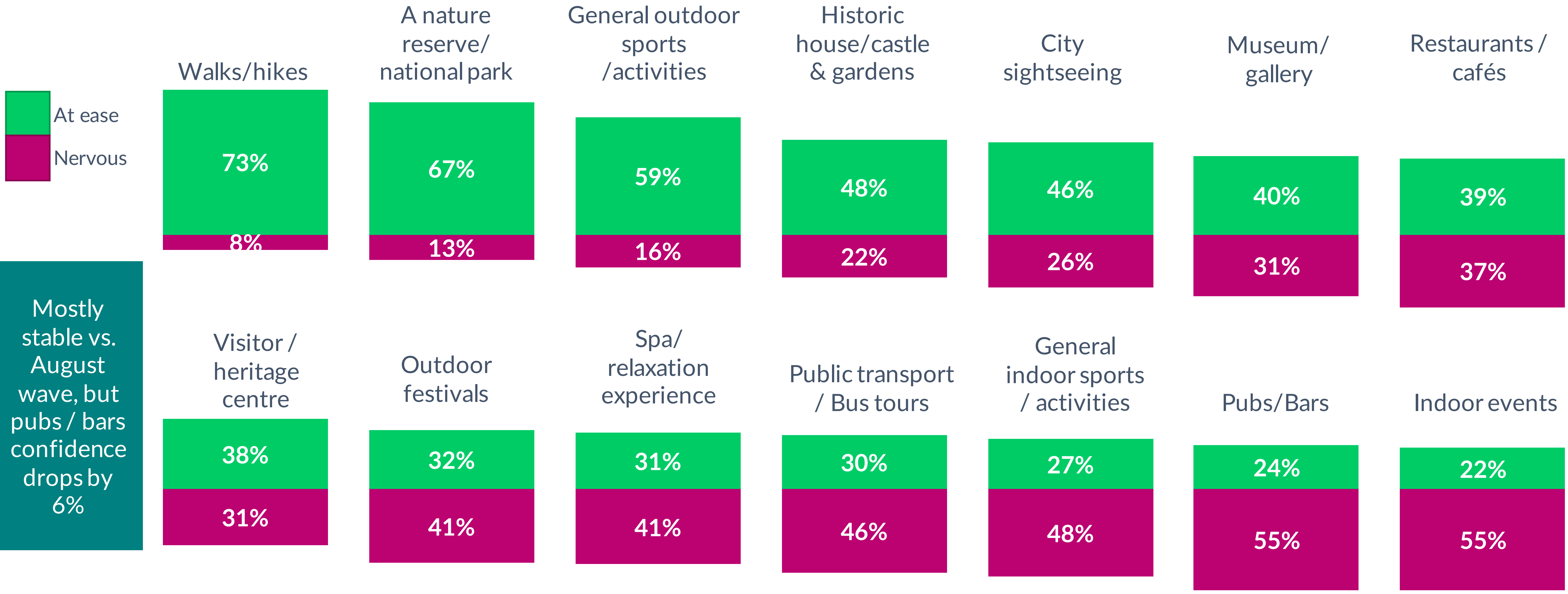



Base n= 400

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)?

# Little change to confidence in activities, **ease with outdoor activities continues and nervousness with indoor activities remains**

**Ease in engaging with activities this autumn / winter**




Mostly stable vs. August wave, but pubs / bars confidence drops by 6%

Base n= 400

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

For those planning trips, **flexible bookings** now as important as Covid-security, which has not grown as a travel trigger since Aug

**Value for money** also remains key

## Triggers to consider a short break in NI


For those planning trips, top three are **Covid-secure, quality food/drink**, and **flexible booking** (all 50%)

Base n = 400

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

## Offers

In line with preference for flexible booking, option for **refunds** is most attractive of offers shown

- When asked what offers would increase the likelihood of considering a short break in NI this year, the top 2 options selected were:
  - ➢ Option to cancel with full refund
  - ➢ Accommodation discounts

Base n = 400

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

# Market Comparison

# Current Attitudes towards Travel

**Big divergence in perceptions of safety in consumers' home regions**

ROI residents' perception of ROI safety drops by 20% to **62%**; for NI residents NI perception stays stable at **71%**

**NI residents now more confident in being able to travel on Island of Ireland**

**36%** (down 15) of NI residents would be confident a holiday wouldn't be cancelled; for ROI residents this is **29%** (down 23)

# Value for money

# NI VFM perception still second highest, close behind Spain. ROI score drops after uptake in August

| Value for money | Poor value for money | Good value for money | Net Score Nov | Net Score Aug | Net Score Apr |
|---|---|---|---|---|---|
| Spain | 8% | 48% | +40 | +38 | +39 |
| Northern Ireland | 14% | 43% | +29 | +30 | +23 |
| Great Britain | 19% | 27% | +8 | +7 | +3 |
| Italy | 25% | 19% | -6 | +11 | -3 |
| France | 27% | 16% | -11 | 0 | -11 |
| Republic of Ireland | 37% | 19% | -19 | 0 | -14 |

N = 400

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

# Travel experiences of NI in 2021

# A quarter visited NI in the past three months, with many of these concentrated in **September**


**Other than NI...**

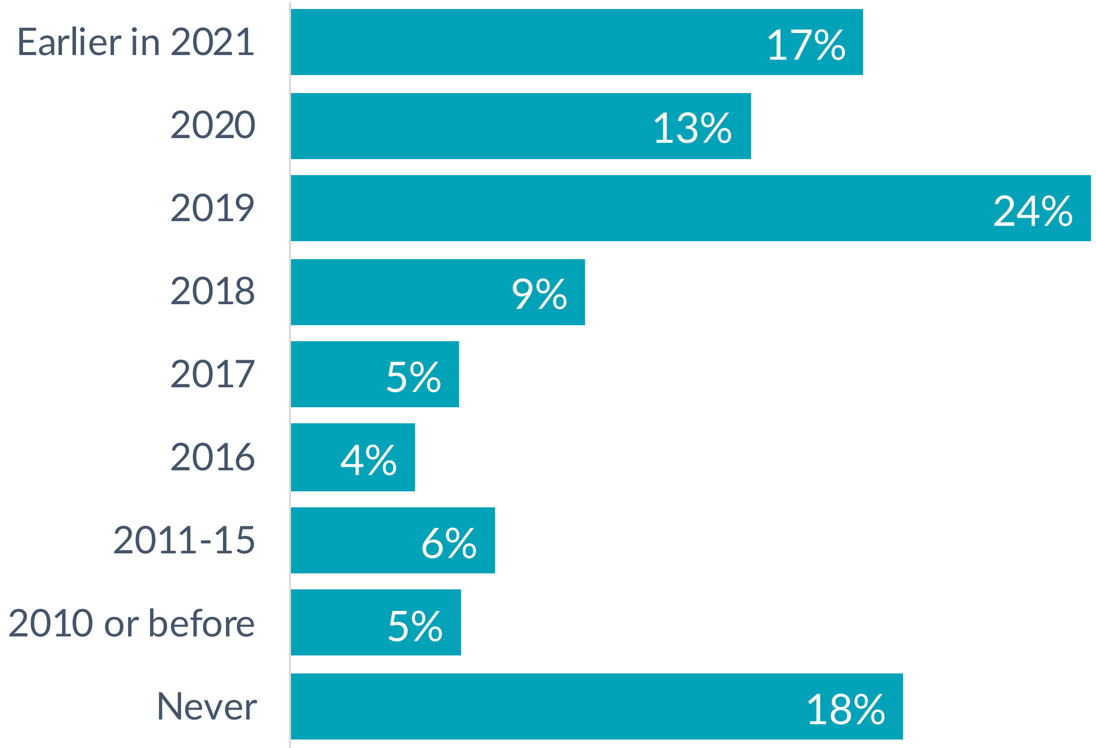
- **13%** took a break in ROI
- **9%** went abroad
- **60%** didn't travel at all

N = 400 / 96 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 since September 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?

# Majority of NI residents who didn't staycation didn't go elsewhere either – staycations very much in the consideration set

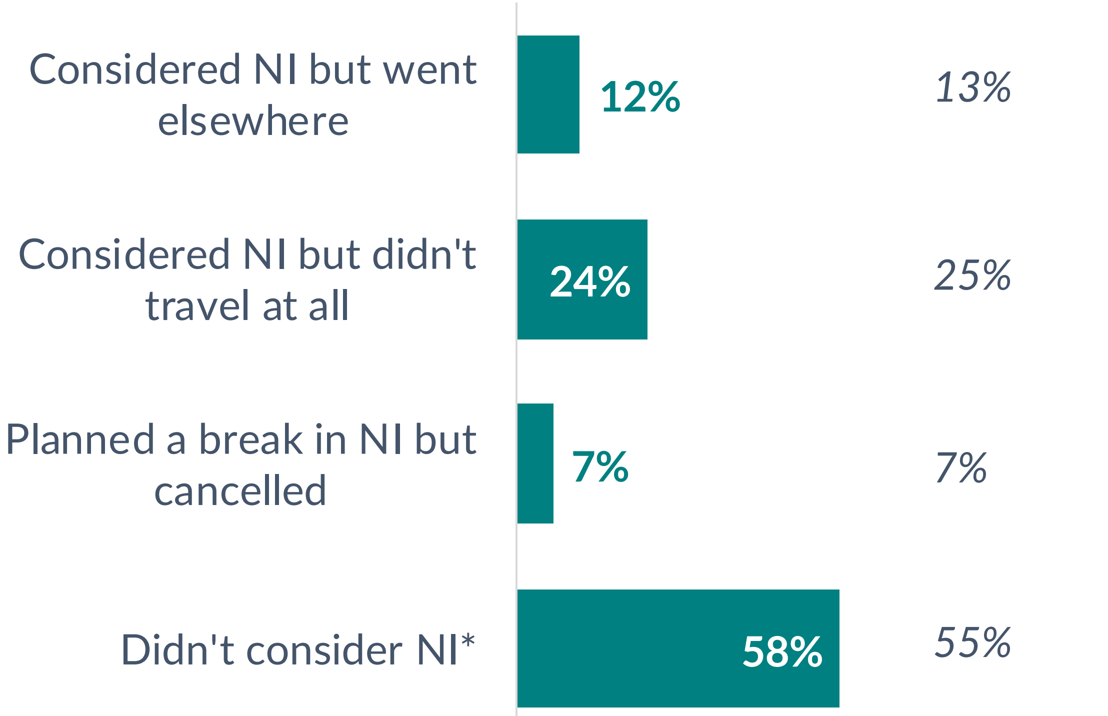
**Those who didn't holiday in NI – last time they did so**




Base n = 304 who didn't take a break in NI

**Those who didn't holiday in NI – did they consider NI as a destination?**

*W5 (Aug)*




**85% of this cohort didn't travel at all*

D1b. You mentioned you haven't taken a break in Northern Ireland in 2021. When was the last time you took a holiday or short break in Northern Ireland? / D2. You mentioned you haven't taken a break in Northern Ireland in 2021. Which of the following best applies to your consideration of Northern Ireland as a holiday destination?

# Most said trip in NI exceeded expectations, with high scores for **quality** – this is biggest selling point in NI market

**How trip stacked up to expectations**

**59%** said their trip **exceeded expectations**

**33%** said their trip **met expectations**

**9%** said their trip **didn't meet expectations**

**What they found 'pleasantly surprising'**

**57%** quality of accommodation

**46%** welcome / hospitality

**45%** quality of food and drink

**42%** price / value for money of accommodation

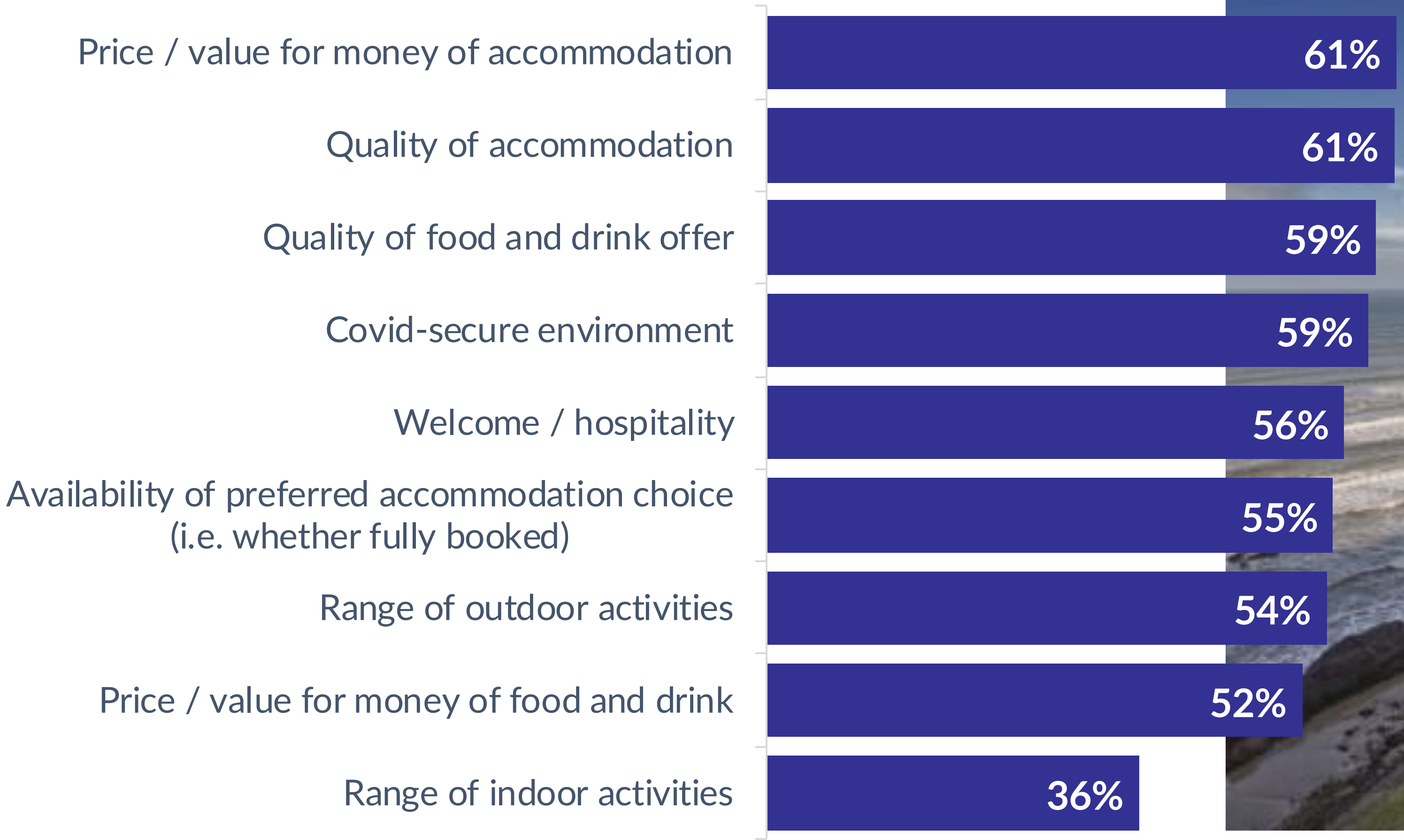
**40%** price / value for money of food and drink

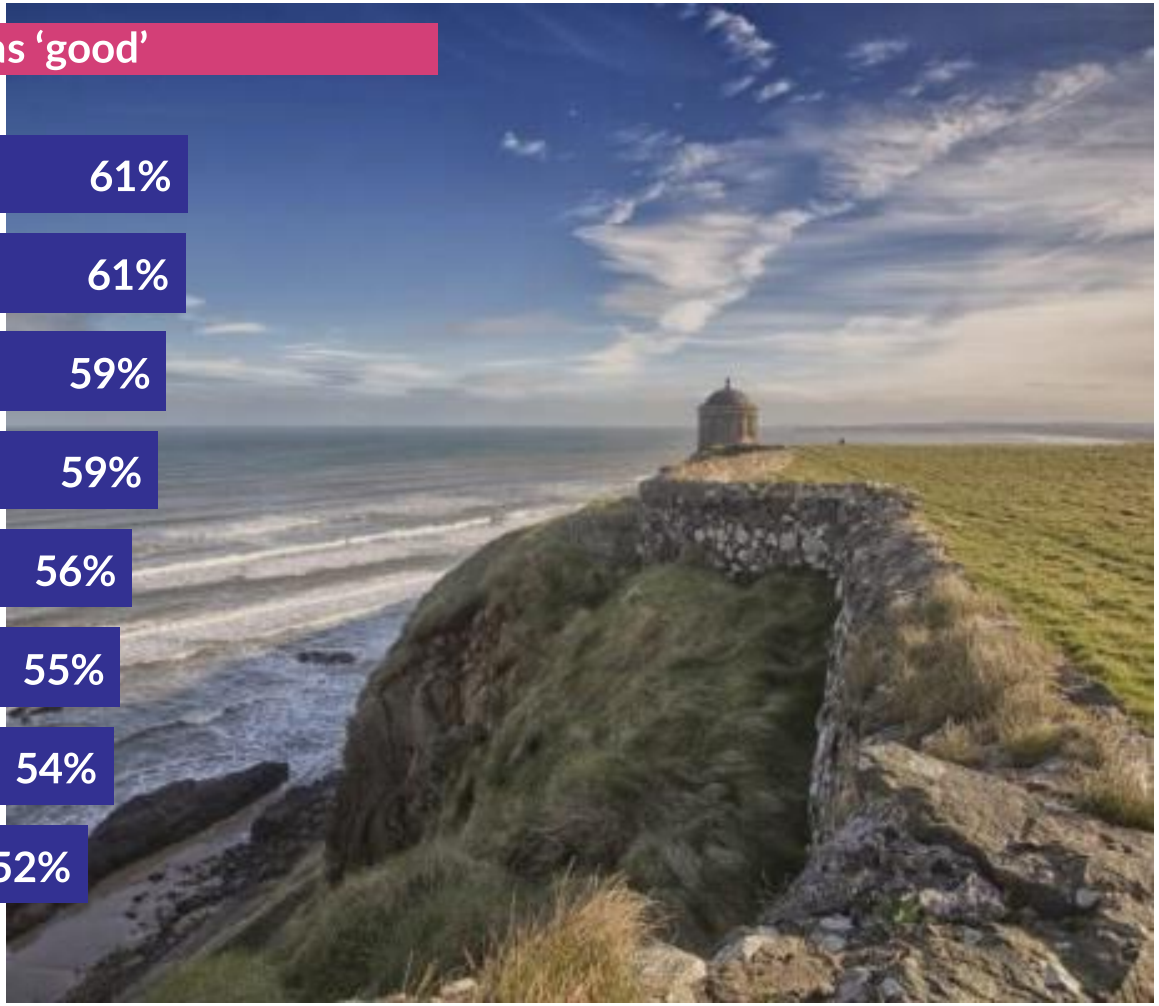
Base n = 96 / 57 exceeded expectations

D5. On the scale below, how did your trip(s) in Northern Ireland perform against your expectations? / D5b. You mentioned your trip exceeded your expectations. What, specifically, did you find pleasantly surprising about your trip?

# Price / VFM and quality are strongest aspects overall

**% reporting the following elements of their trip as ‘good’**



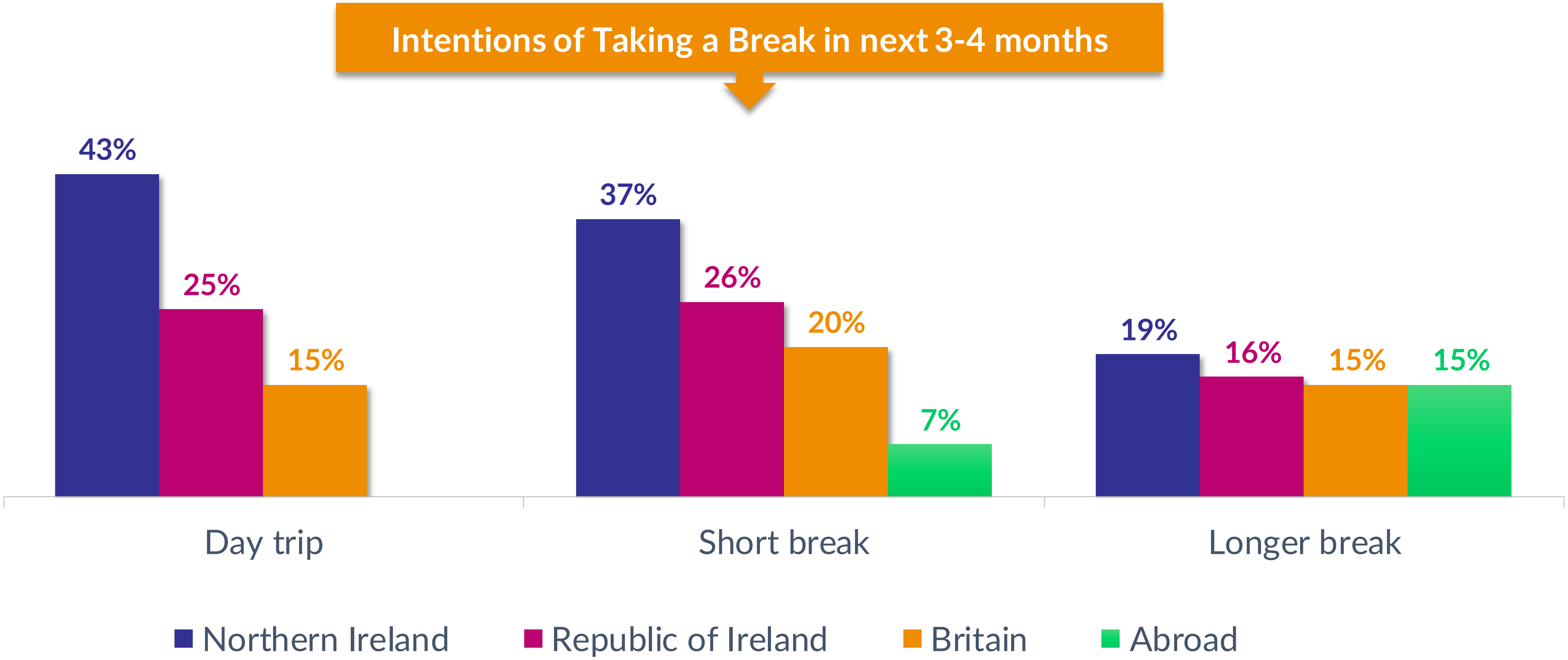



Base n = 96

D8a. Thinking about your recent trip(s) in Northern Ireland, how would you rate the following aspects?

# Travel intent

# Strong day trip and short break intentions over next 3-4 months – **bodes well for staycations**




Base = 400

# **Significant growth** in travel intentions vs. Aug 2021

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

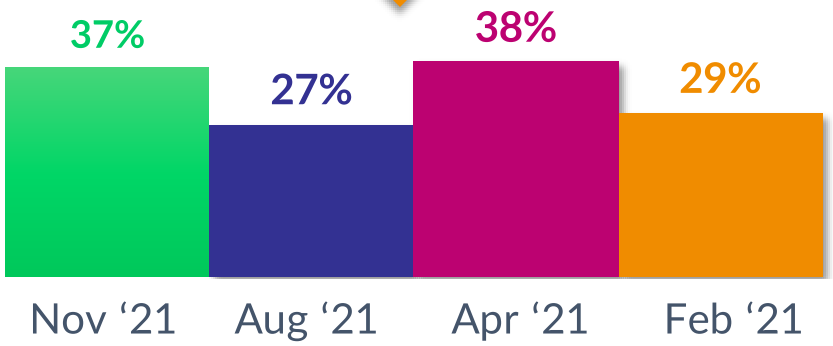
43% Leisure day trip

37% Short break

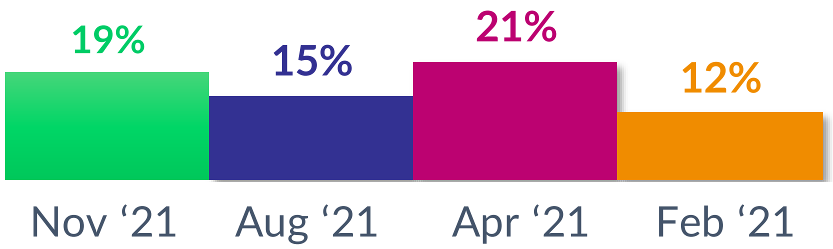
19% Long break

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

**Short Break NI**




**Long Break NI**




Of those considering short trips, **48%** actively planning (18% total sample)
Short trip intentions higher with **Aspiring Families** (53%) and **Social Instagrammers** (45%)

Of those considering long trips, **39%** actively planning (8% total sample)
Short trip intentions higher with **Aspiring Families** (33%) and **Social Instagrammers** (29%)

Base (n) = 400

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?

# Intent highest for March – proportion actively planning down slightly

**Note**: Previous waves assessed **intent** rather than **consideration**

N = 400

**37%** considering taking a short break in Northern Ireland

*W5: 27% W4: 38% W3: 29% W2: 21% W1: 25%*

**How much of your short trip have you planned?**

N =147

| I have booked | Actively planning | Intend to start planning later | May or may not plan |
|---|---|---|---|
| 19% | 29% | 31% | 21% |

**48%** are actively planning a trip in NI – 18% of the total sample (*Aug: 59%*)

N =147

***Consideration of short breaks to Northern Ireland in:**

| November | December | January | February | March |
|---|---|---|---|---|
| 5% | 17% | 16% | 23% | 44% |

14% 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?

# Long break intention **mainly concentrated in March**

**Note**: Previous waves assessed **intent** rather than **consideration**

N = 400

**19%** considering a long break in Northern Ireland
W5: 15% *W4: 21% 5%* W3: 12% *W2: 9% W1: 12%*

## How much of your longer trip have you planned?

N = 76 – caution low base size

| I have booked | Actively planning | Intend to start planning later | May or may not plan |
|---|---|---|---|
| 9% | 30% | 29% | 32% |

**39%** are actively planning a trip in NI – **8%** of the total sample

N = 76

## *Consideration of longer breaks to Northern Ireland in:

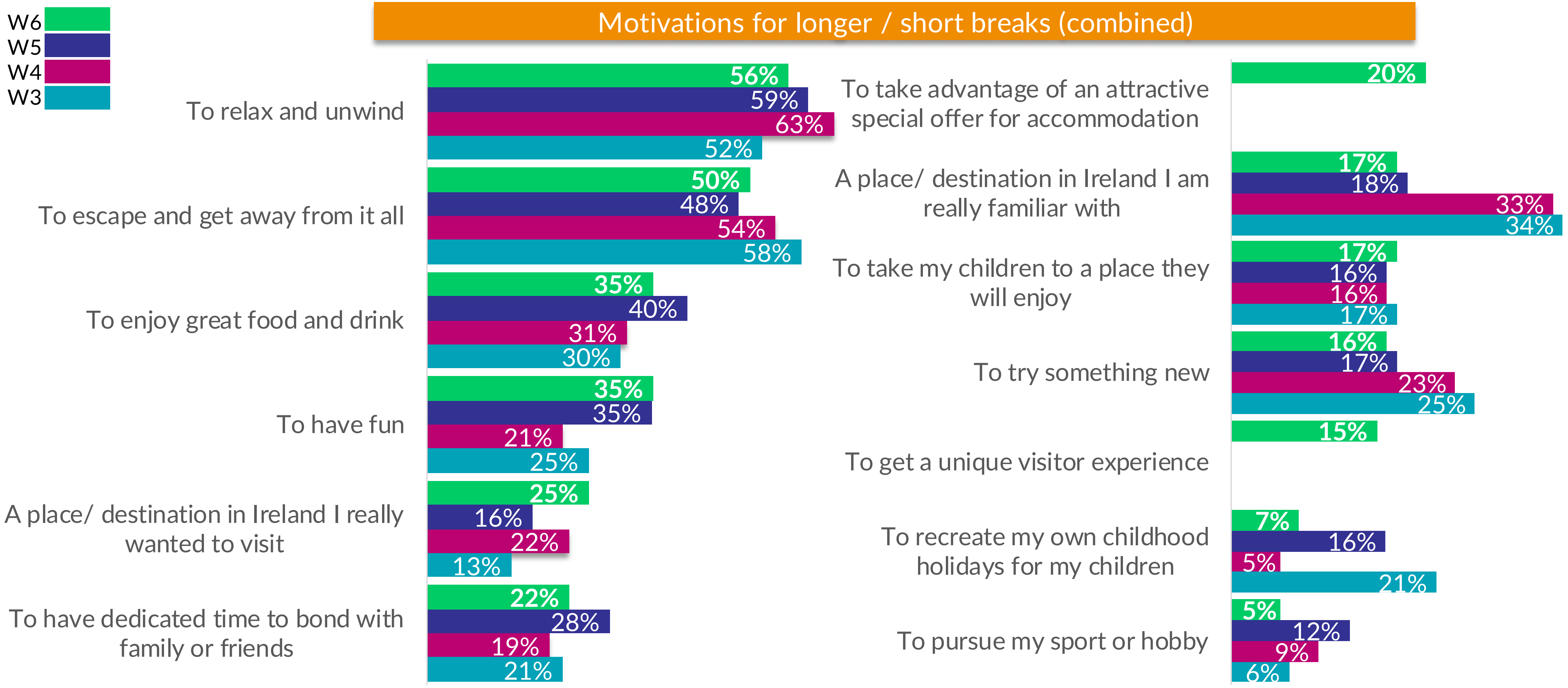
| November | December | January | February | March |
|---|---|---|---|---|
| 2% | 5% | 8% | 19% | 52% |

23% 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?

# Slight growth in numbers wanting to **escape and get away from it all**

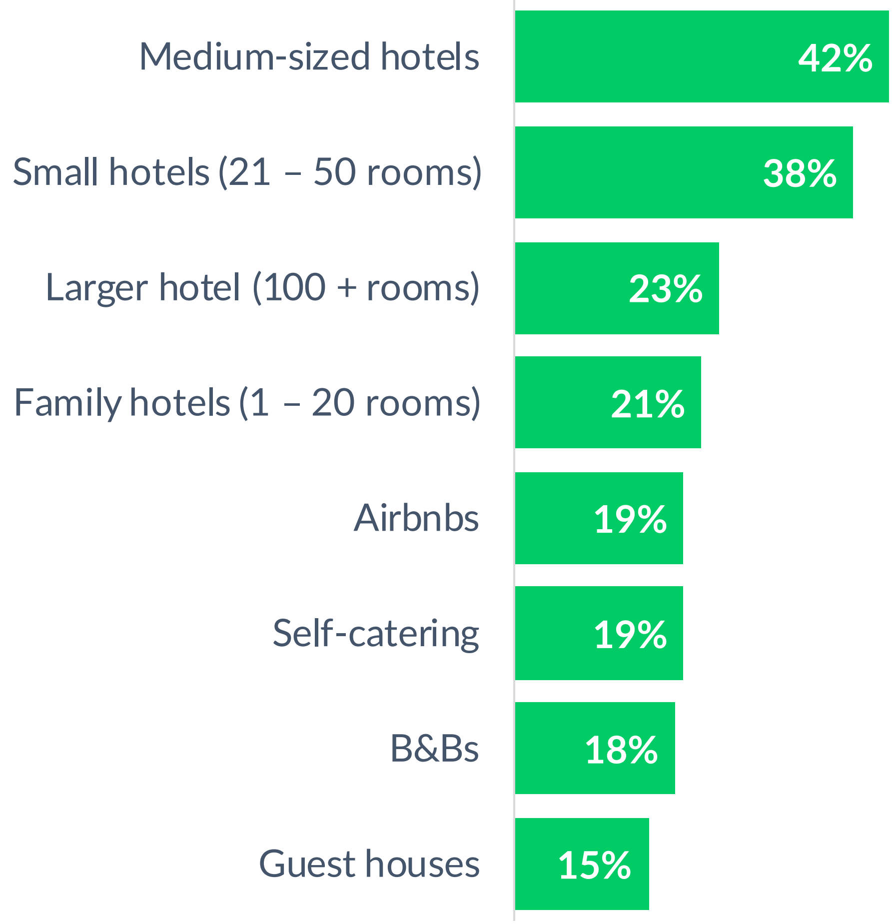



Base = 120

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

# Similar to ROI residents, expect most to be travelling with partners and staying in medium hotels

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




**Who travelling with (long & short combined)**

- 53% Partner / spouse
- 40% Immediate family
- 24% Friends

- Long breaks more so with **families**; short trips with **partners**
- Short breaks more likely to be in **small hotels**; long trips in **medium hotels**

Base = 121

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?

## We’re Good to Go

- While awareness of We're Good to Go has dipped slightly since August, the confidence that it instils has increased since the last wave.

# Awareness of WGTG down slightly, but confidence increased

Base n = 400

E10. Are you aware of the ‘We’re Good to Go’ mark? / E11. To what extent does the ‘We’re Good to Go’ mark give you confidence that a tourism or hospitality business is safe to visit?

# No change in numbers planning a break abroad, a **positive sign** given NI trip intention boost

# Possibility of quarantine is a big barrier, **ease and proximity** of NI likely to remain an advantage

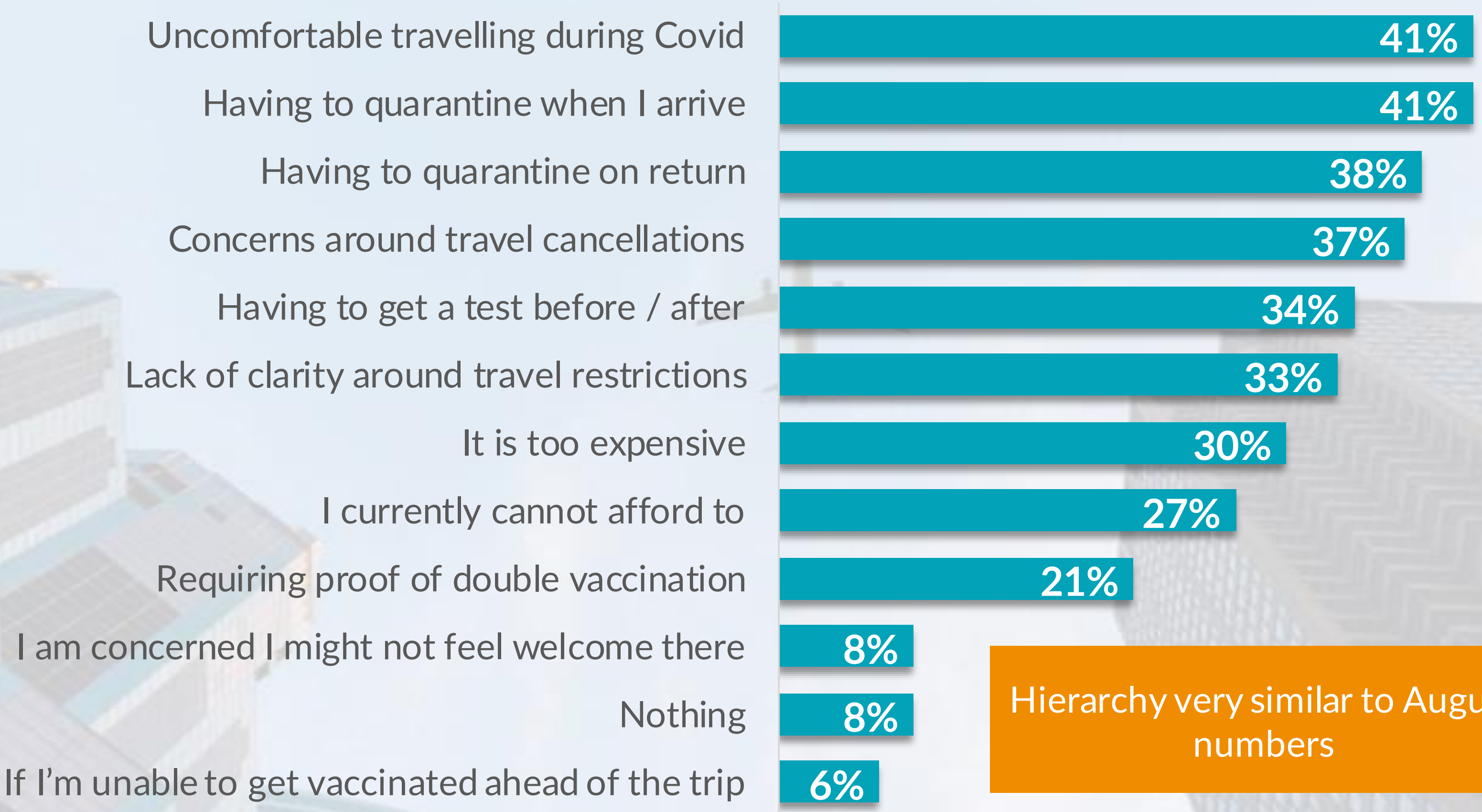
Base = 400 / 69 – Intending on travelling abroad

**15%** of total sample are considering a break abroad in the next 3-4 months

**61%** of this cohort are actively planning or have booked their trips

In August, **15%** of total sample were planning on a break abroad

## Barriers to taking a break abroad




Hierarchy very similar to August numbers

E14. You mentioned that you intend on taking a break abroad in 2021, have you booked or thought about planning this trip abroad?/ E16. What, if anything, would put you off booking a holiday or short break abroad this year?

# Christmas shopping intentions up significantly on last year

## Likelihood to take a trip in NI for Christmas shopping

**21%** likely to **stay overnight** in NI this December

**39%** likely to take a **day trip** for Christmas shopping

2020: 5% overnight, 22% day trip – **significant increases** in both

Social Instagrammers highest likelihood (**47%**)

## Key reasons that would encourage overnight stay


N = 400



E17. How likely would you be to take an overnight break in Northern Ireland for mainly Christmas shopping purposes (e.g. non-grocery shopping) this Christmas? / E18. And how likely would you be to take a day trip in Northern Ireland for mainly Christmas shopping purposes (e.g. non-grocery shopping) this Christmas? / E20. What would be the main reasons that would encourage you to take an overnight shopping break in Northern Ireland?

# Market Comparison
## Travel Intent

**NI travel intent grows in both markets – but especially in NI, where confidence is higher**

March 2022 top month for both markets

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

**Staycation intent similar in both markets**

We had previously seen NI residents less likely to consider an NI trip than ROI residents an ROI trip – these figures are now in line with one another

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