Tourism Northern Ireland Consumer Sentiment Research

NI Market – Wave 13 (October 2023)

Research background

Research background & objectives

This is the **13th wave** of our consumer sentiment research for Northern Ireland. We have continued to look at consumer attitudes towards travel in NI and elsewhere, keeping an eye on how things have changed throughout 2023 and travel intentions looking ahead.

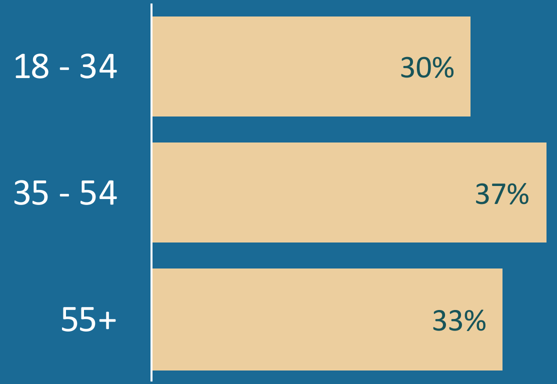
The research objectives:

- Understand recent travel experiences in NI
- Explore current attitudes towards travel
- Assess current attitudes towards travel in NI, ROI and further afield
- Understand attitudes, and impact of plans for travel, in light of cost-of-living increases

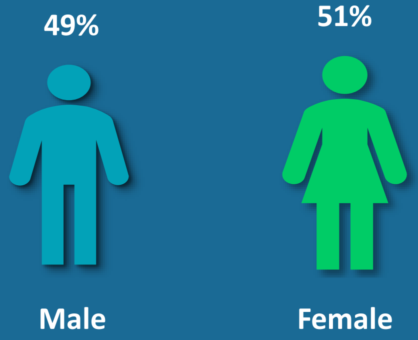
Sample - We spoke to a robust, nationally representative sample in Northern Ireland

Full sample n=400

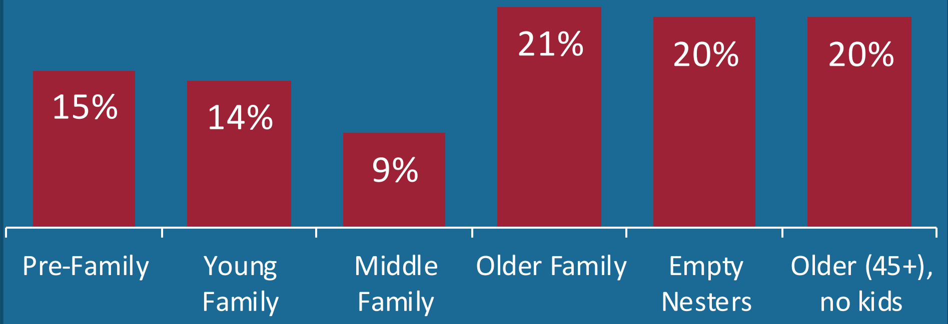
Age



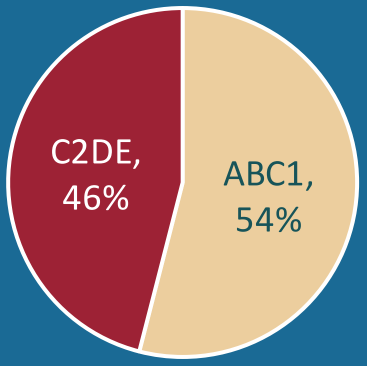
Gender



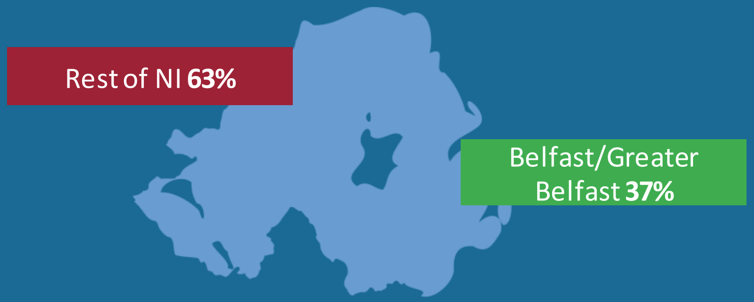
Lifestage



Socio



Region



Fieldwork was conducted between 13 September and 27 September 2023

Key takeaways

NI travel experience still performs well, and VFM perception not hit

- Continued high levels of domestic visitor volumes - 1 in 3 domestic consumers have taken a short or long break in NI this year, with 92% saying their expectations were met or exceeded. In particular, hospitality and the range of places to eat and drink / things to see and do, scored highly.
- Consumers continue to rate NI as better value for money than ROI and GB. Competition from abroad remains potentially strong however, as both Spain and Portugal are perceived as better value for money destinations.

Trip intentions have dropped in both NI and ROI for coming months

- Trip intentions have dipped vs. this time last year - not only for NI but also for ROI. Short break intentions for next 3 months decrease by 4 percentage points vs. September 2022; intentions for early 2024 decrease by 9 percentage points.
- Of those planning trips in NI, relaxation and escapism remain the top 2 reasons; quality accommodation and "pampering" increase notably.
- It's notable that the decrease in NI trip intentions is not significantly offset by an increase in planned trips abroad (no change YoY in long trips abroad planned for next 6 months).

Cost of living continues to affect people and seems to be behind the dip in intentions

- Cost of living continues to be a significant issue affecting most people – 85% said they expect to be affected in the coming months.
- And when prompted, 27% said they would be more likely to choose the island of Ireland over a trip abroad (compared to 19% who would be more likely to go abroad).
- However, a small majority do agree that if they can only take one holiday a year, it will be abroad.

Travel experiences

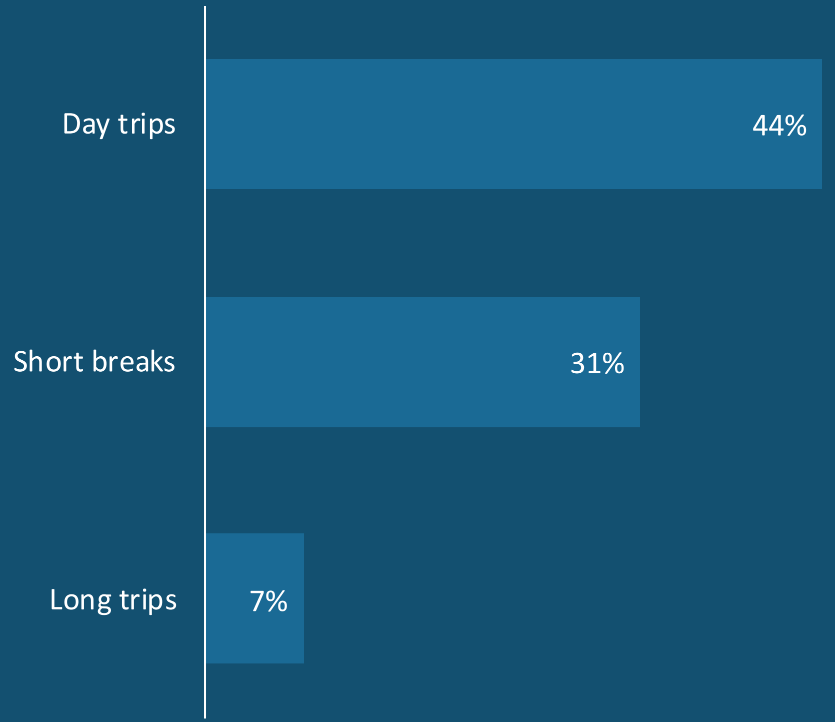
1 in 3 have taken a trip in NI so far in 2023. A quarter of people have not travelled at all

33%

have taken a **short or long break** in NI in 2023

Wave 9 (Sept 2022): 37%

% of total sample who took…



Other than NI…

34% took a break in ROI
Vs 34% in Wave 9

28% went abroad
Vs 32% in Wave 9

24% didn't travel at all
Vs 31% in Wave 9

N = 400

D1a. Have you taken a day trip, short break, or long trip in the Republic of Ireland, Northern Ireland or abroad for leisure purposes since the start of January 2023?

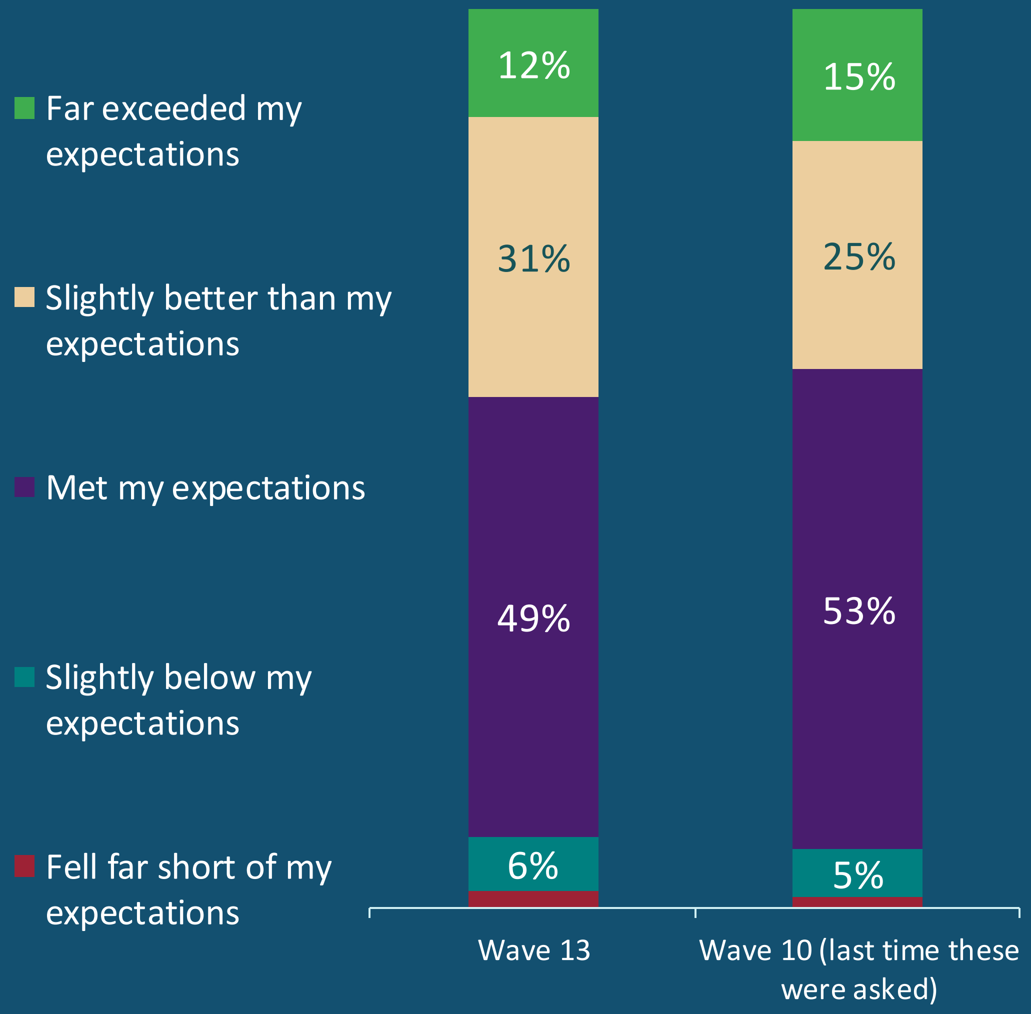
The vast majority say their trip met or exceeded expectations – stable vs. last time we asked these questions

92%

had their expectations met or exceeded

Vs 93% in Wave 10

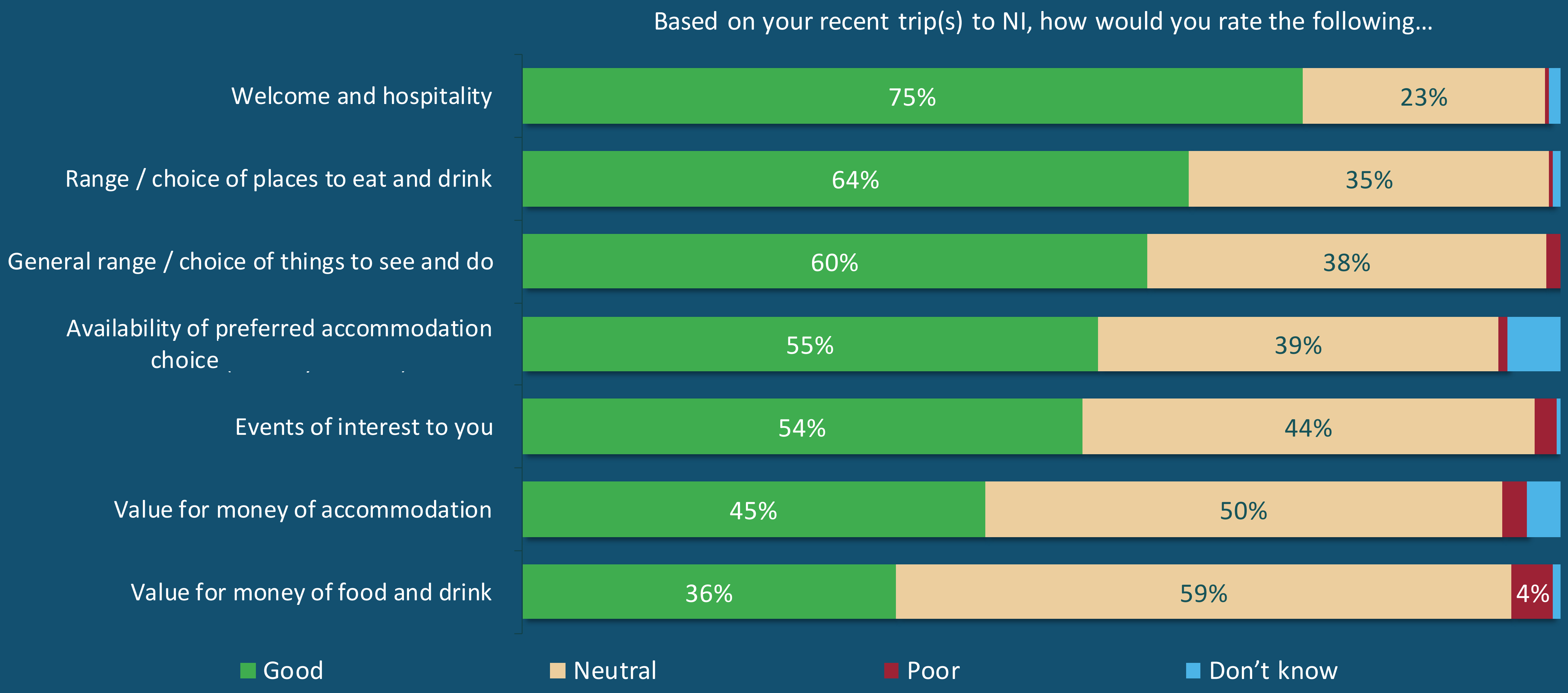
Those who visited NI felt their trip…



N = Those took a day trip, short break or long break in NI

D5 On the scale below, how did your trip(s) in Northern Ireland perform against your expectations?

Most aspects seen as being good by over half of travellers, especially "welcome and hospitality"

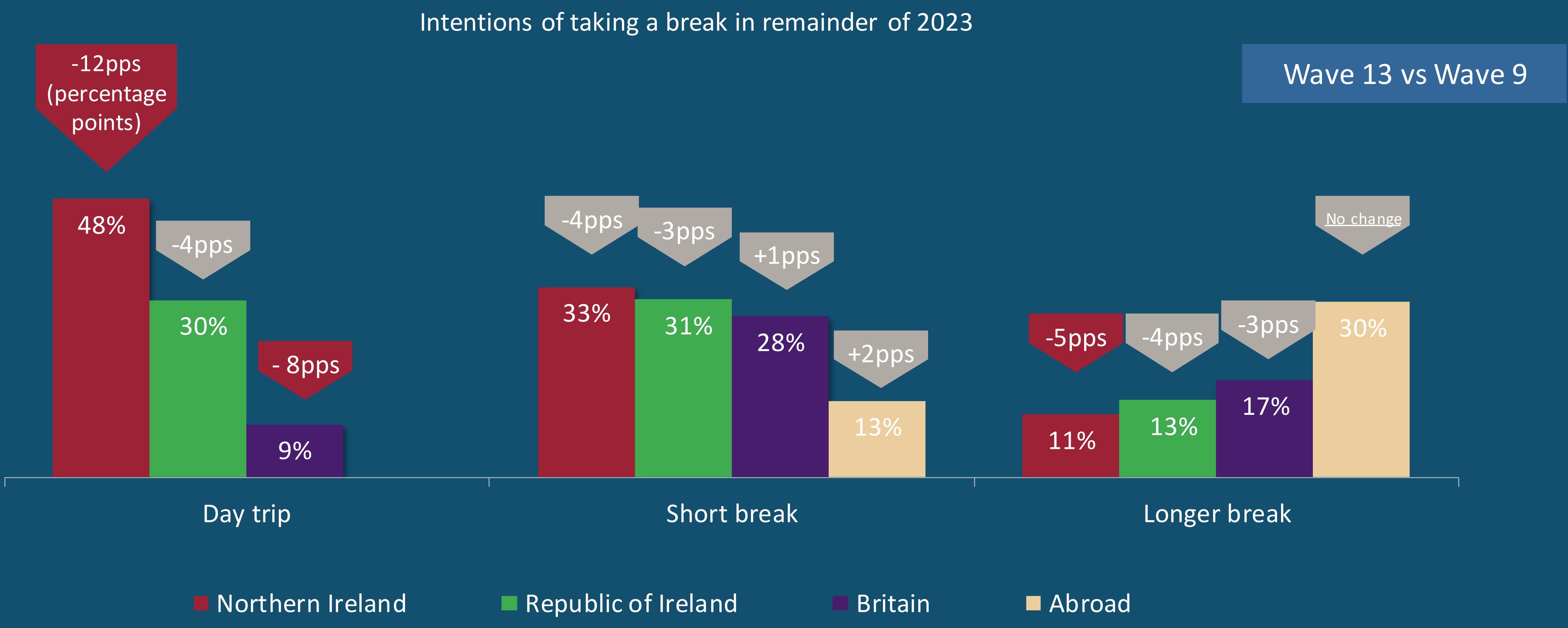


N = Those who took a day trip, short break or long break in NI

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

Travel intent

Trip intentions for rest of 2023 drop vs. this time last year – for both NI and ROI

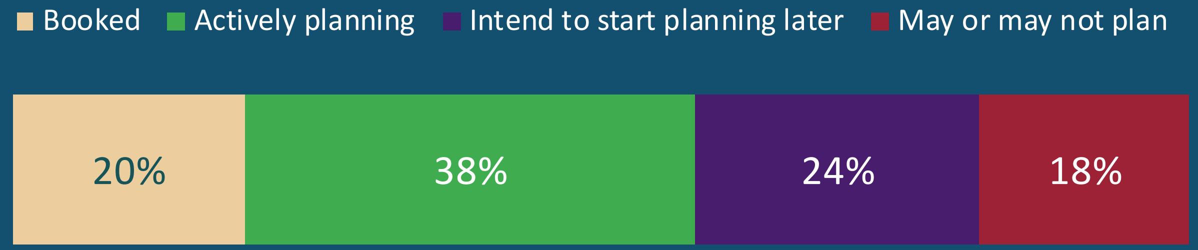


N = 400

E1. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the next 3 months October – December

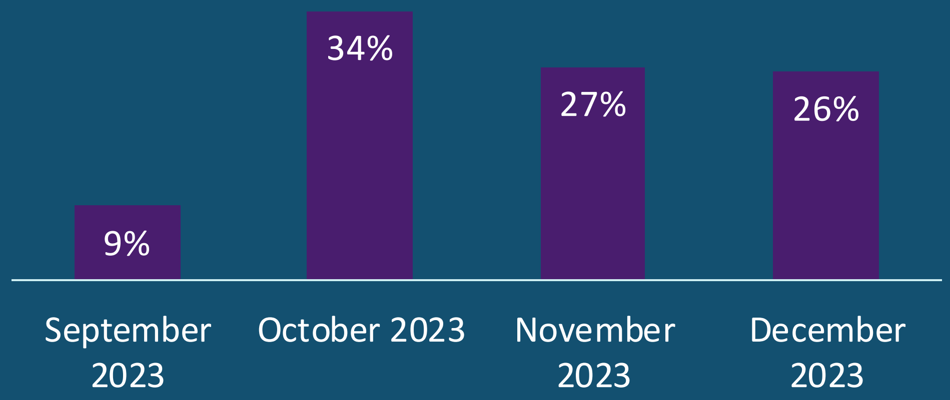
Over half of those considering a short break have booked or are actively planning

Status of short break – have they booked?



58% are actively planning or have booked a trip to NI – 19% of the total sample

Short break planned for



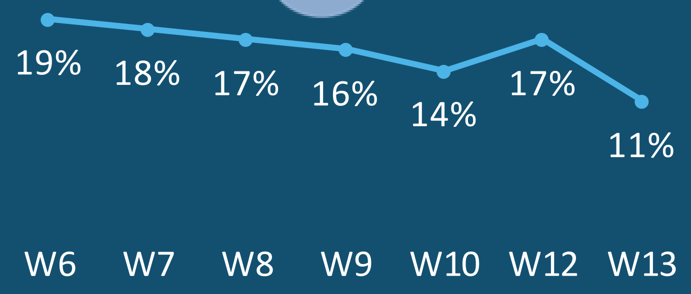
N = 400

E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the next 3 months (October to December)? / 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?

Similar to short breaks, we see a decline for Wave 13 compared to Wave 9 for longer trips. We do see older families are more open to taking these

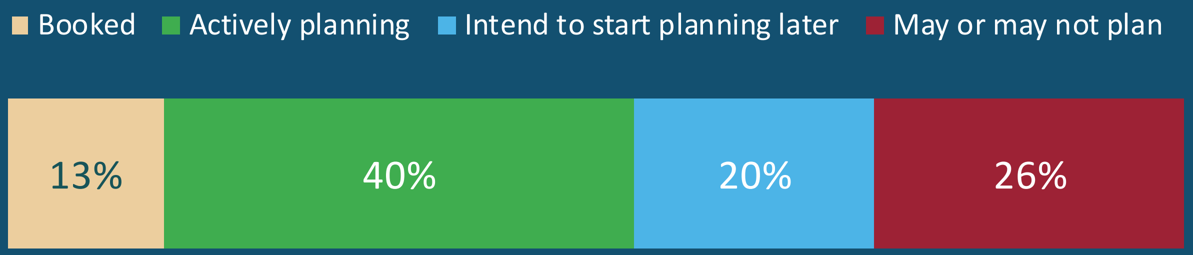
11%

are considering a **long break** in NI in late 2023



Older families are significantly more likely to consider a longer trip (18%)

Status of long break – have they booked?



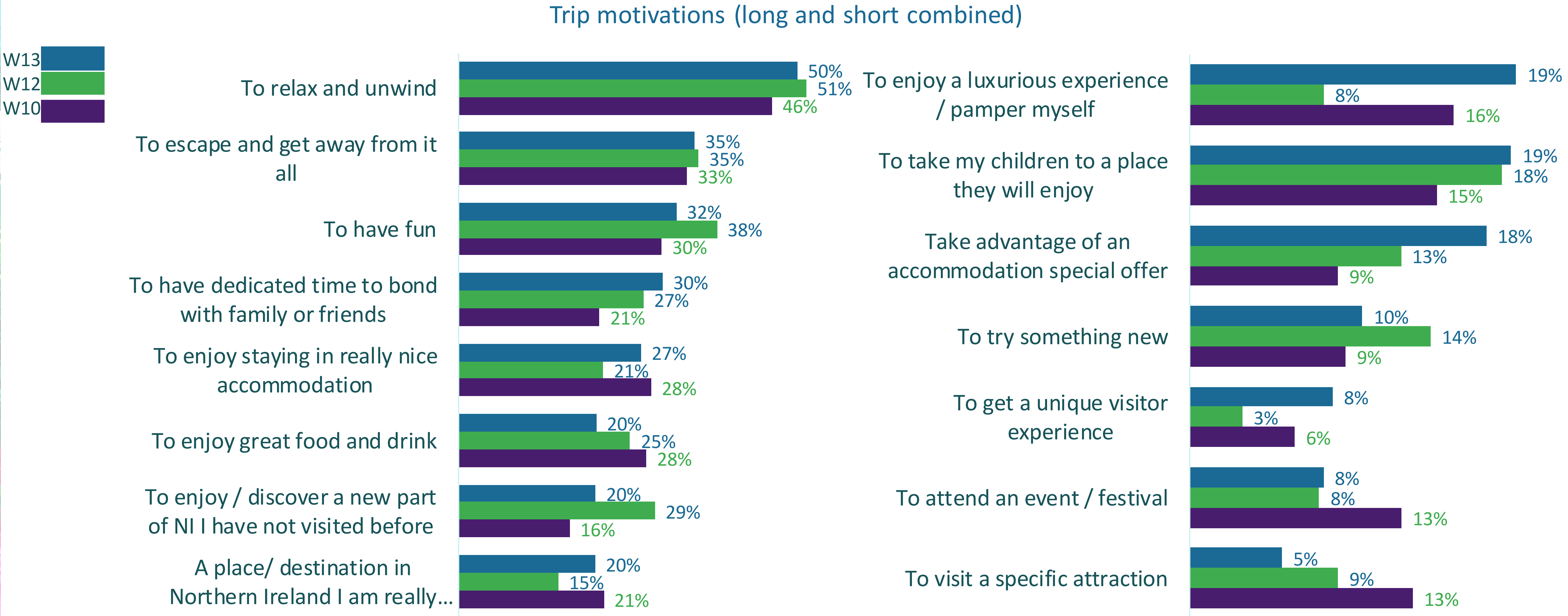
52% are actively planning or have booked a trip to NI – 6% of the total sample

Long break planned for

N = 400

E1b. Would you consider taking a leisure day trip / short break of 1-3 nights / longer break of 4 or more nights in the Republic of Ireland, Northern Ireland or Britain in the next 3 months (October to December)? / 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?

The main motivations for trips remain the same. However, “pampering myself” has seen a large increase this wave

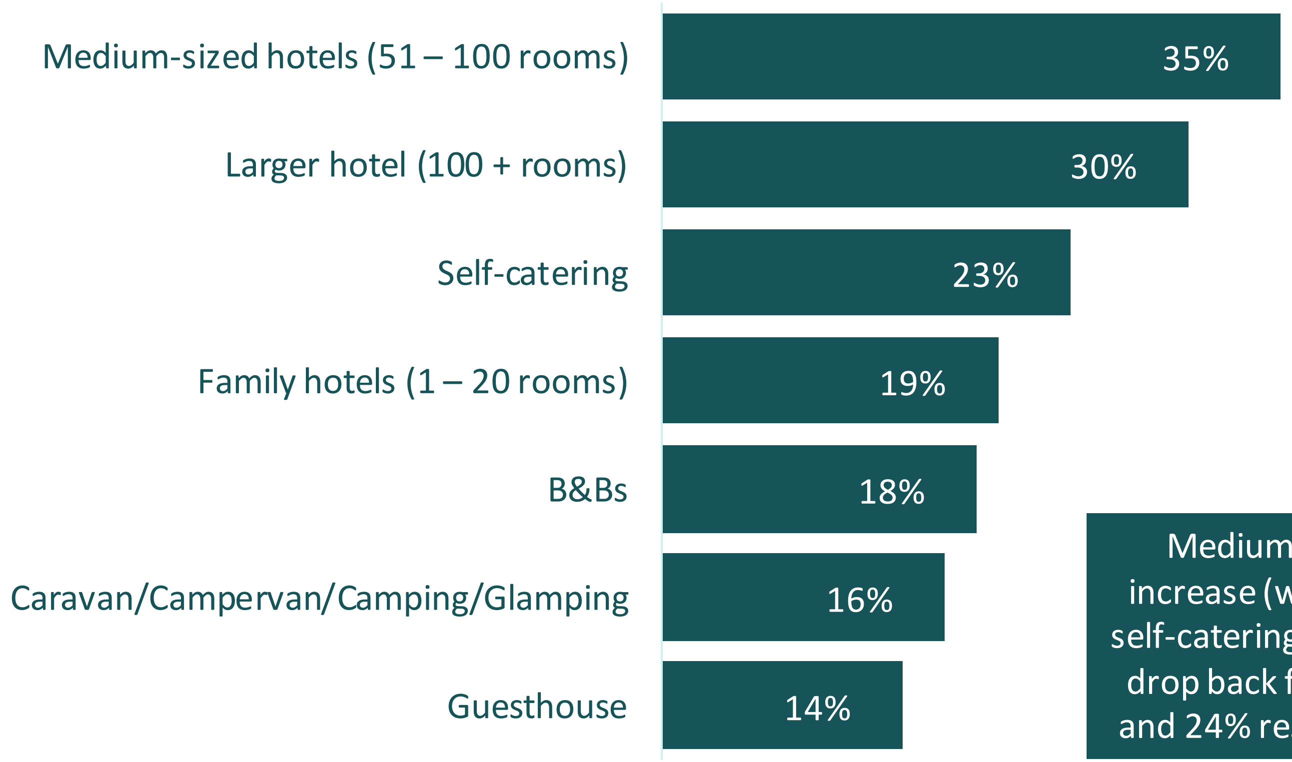


N = Those planning long or short break (excl. “may or may not” plan)

E4a. Thinking about your upcoming trip(s) in Northern Ireland, which of the following are the three most important motivations for taking the trip?

Over a third of people are staying in medium-sized hotels with over half travelling with their partner only – likely a seasonal increase over autumn / winter break

Where staying (*showing 10% or higher*)



Medium hotels increase (was 28%); self-catering / caravan drop back from 28% and 24% respectively

Who travelling with

- 55% Partner / spouse
- 45% Immediate family
- 22% Friends

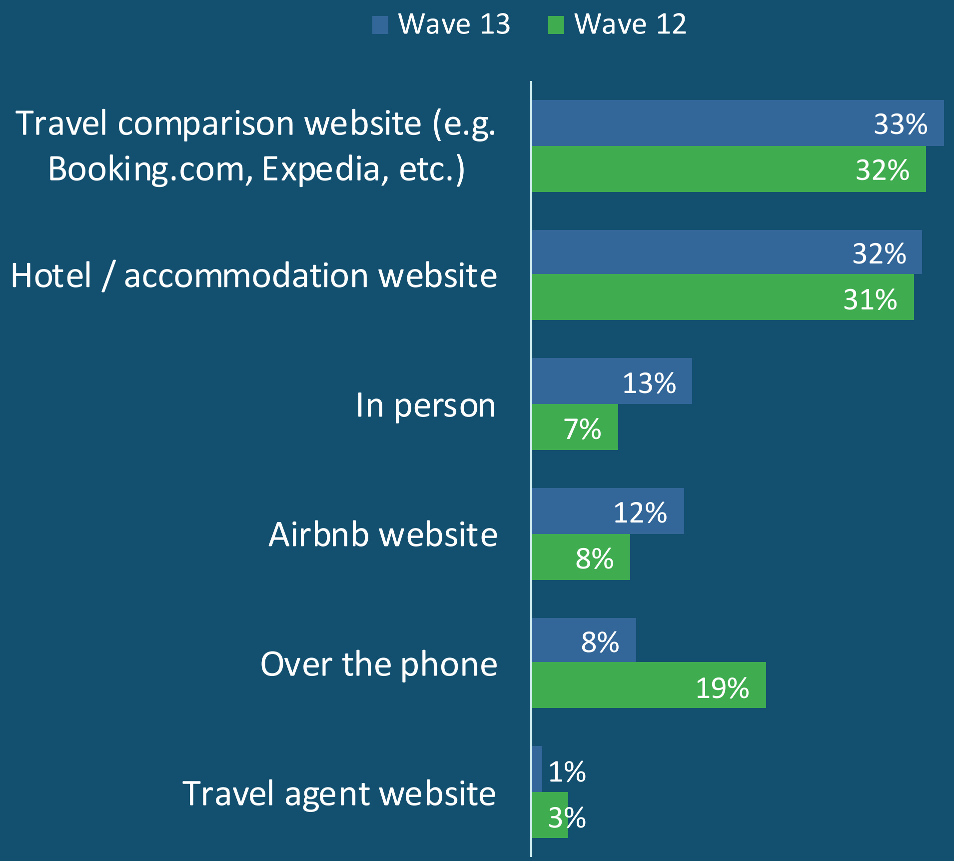
Partner / spouse increases vs. last time – was 46%. Immediate family drops

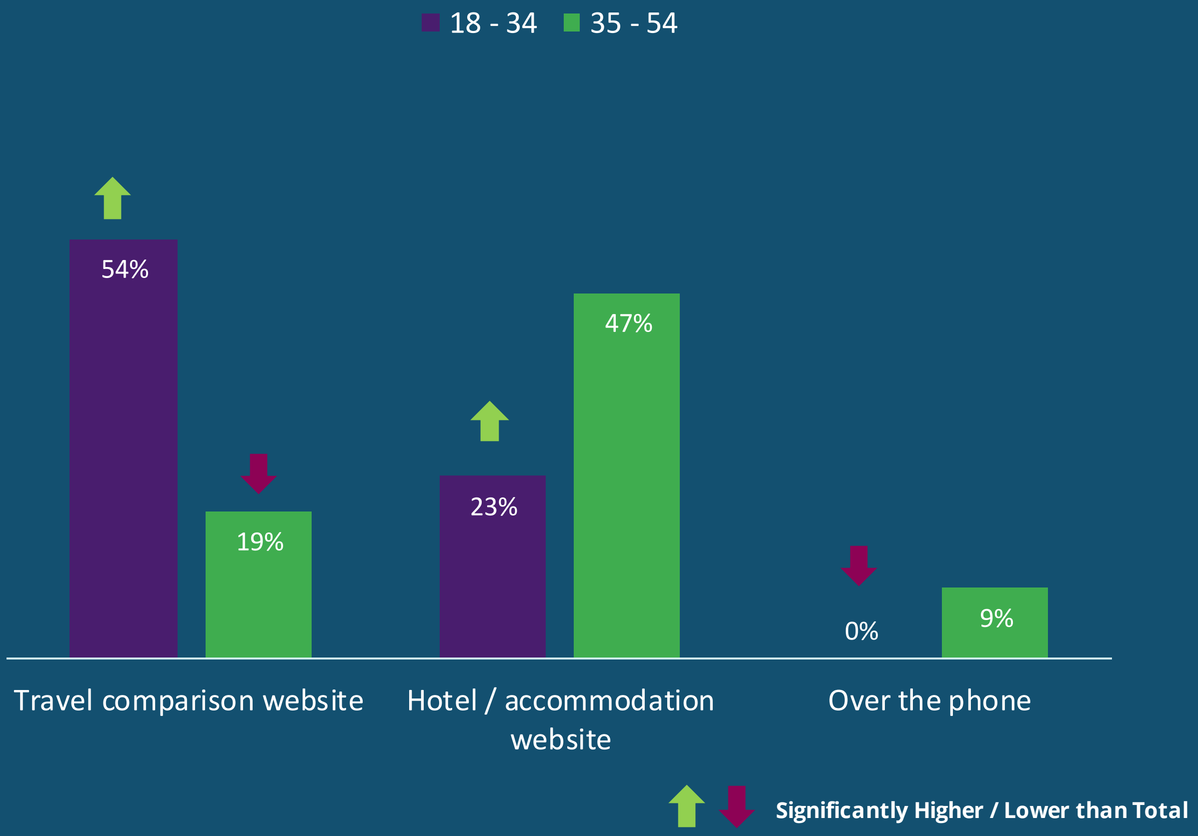
N = Those planning long or short break (excl. "may or may not" plan)

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? /E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer?

Comparison websites remain a key booking method especially among those aged under 35

How they plan to book their trip



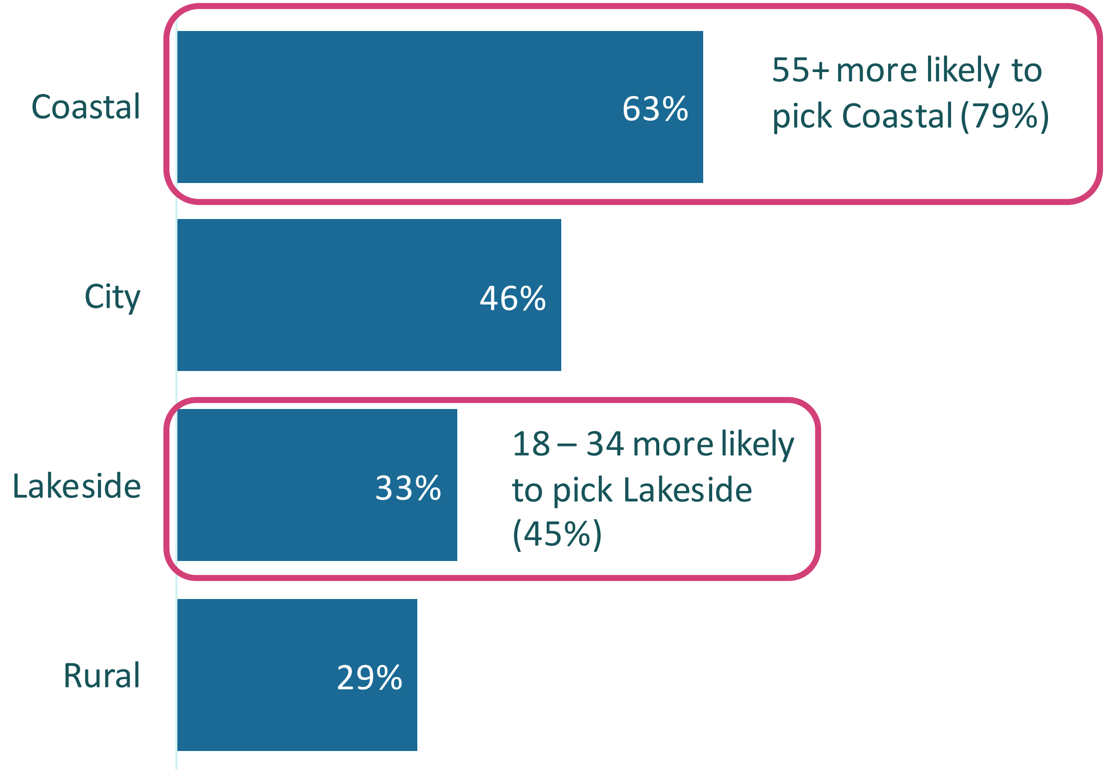


N = Those planning long or short break (excl. "may or may not" plan)

E8W12. How do you plan to book your upcoming short or long break in Northern Ireland?

Coastal trips are the preferences for those travelling in NI with almost 2/3 looking for a more laid-back holiday – increase in city breaks over this period

Type of break preferred



Type of trip preferred

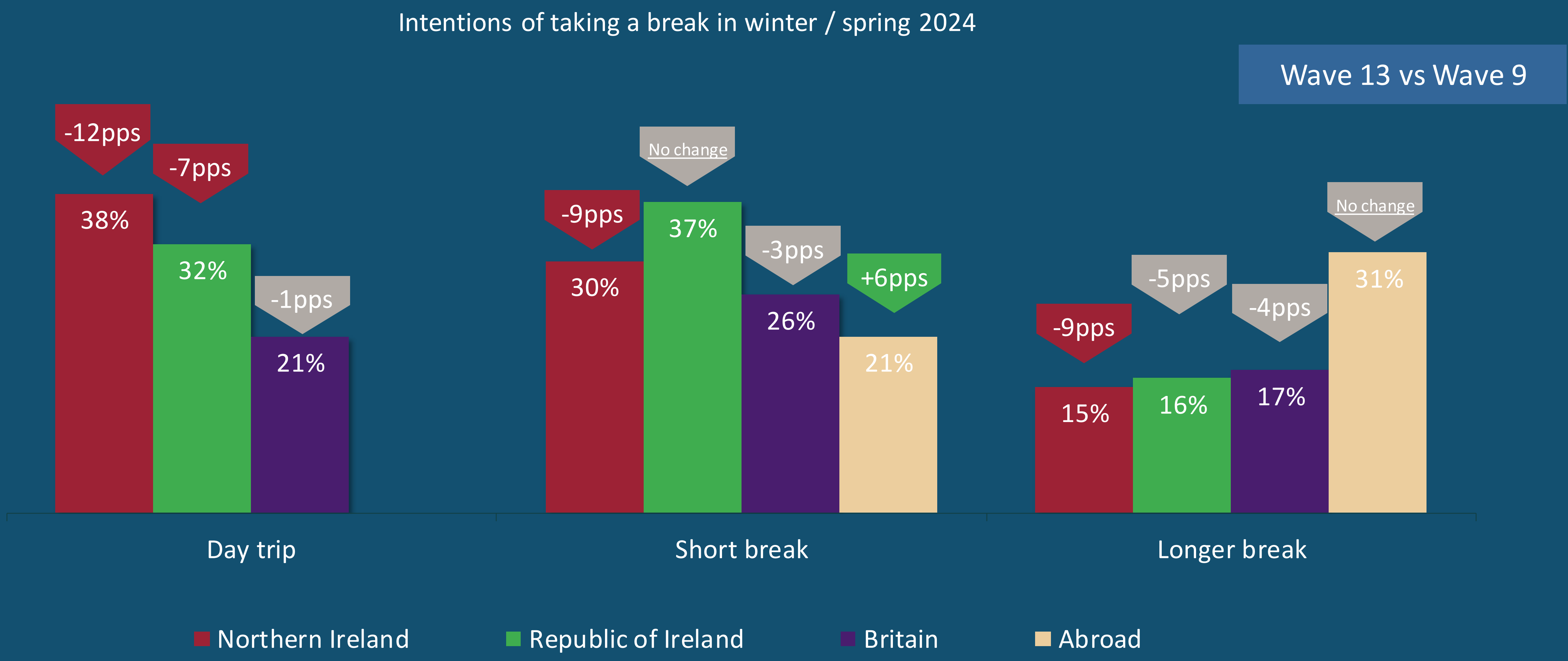
- 64% Laid back holiday
- 15% Exciting holiday
- 21% A bit of both

City increases from 32% to 46% vs. previous wave in April – likely a seasonal impact – and laid-back holidays from 57% to 64%

N = Those planning long or short break (excl. “may or may not” plan)

E6. Thinking about your upcoming trip(s) in Northern Ireland, what type of trip would you prefer? / E36. Which of the following best describe your upcoming short break(s) or long trip(s) in NI?

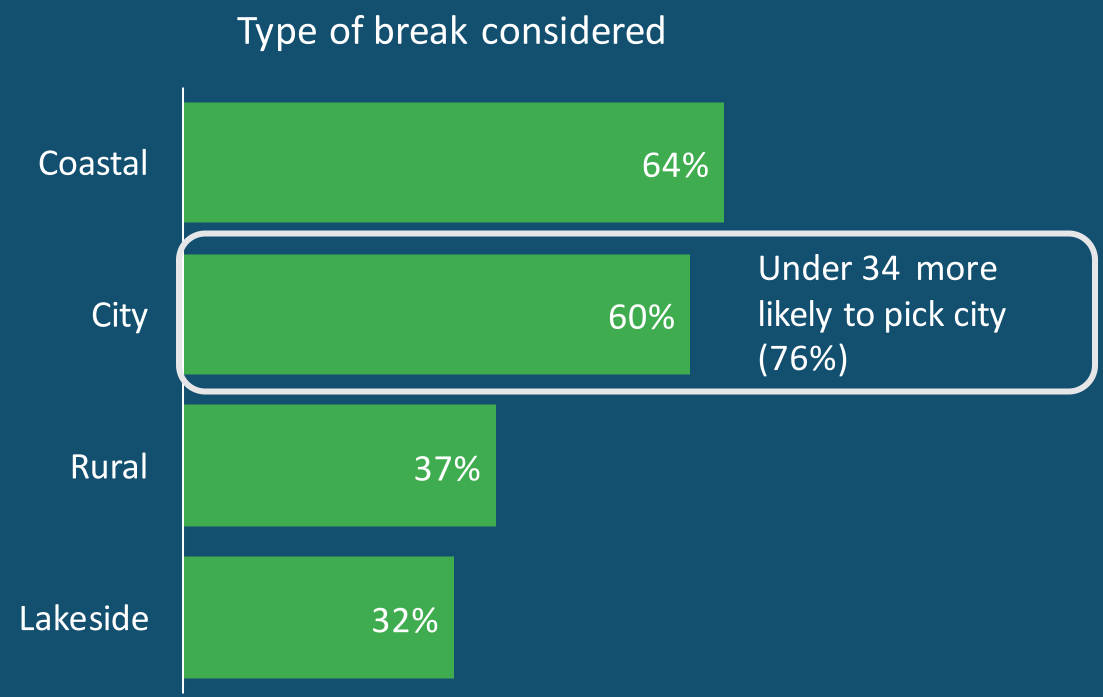
Looking forward to winter/spring 2024, we see that domestic trip intentions have dipped

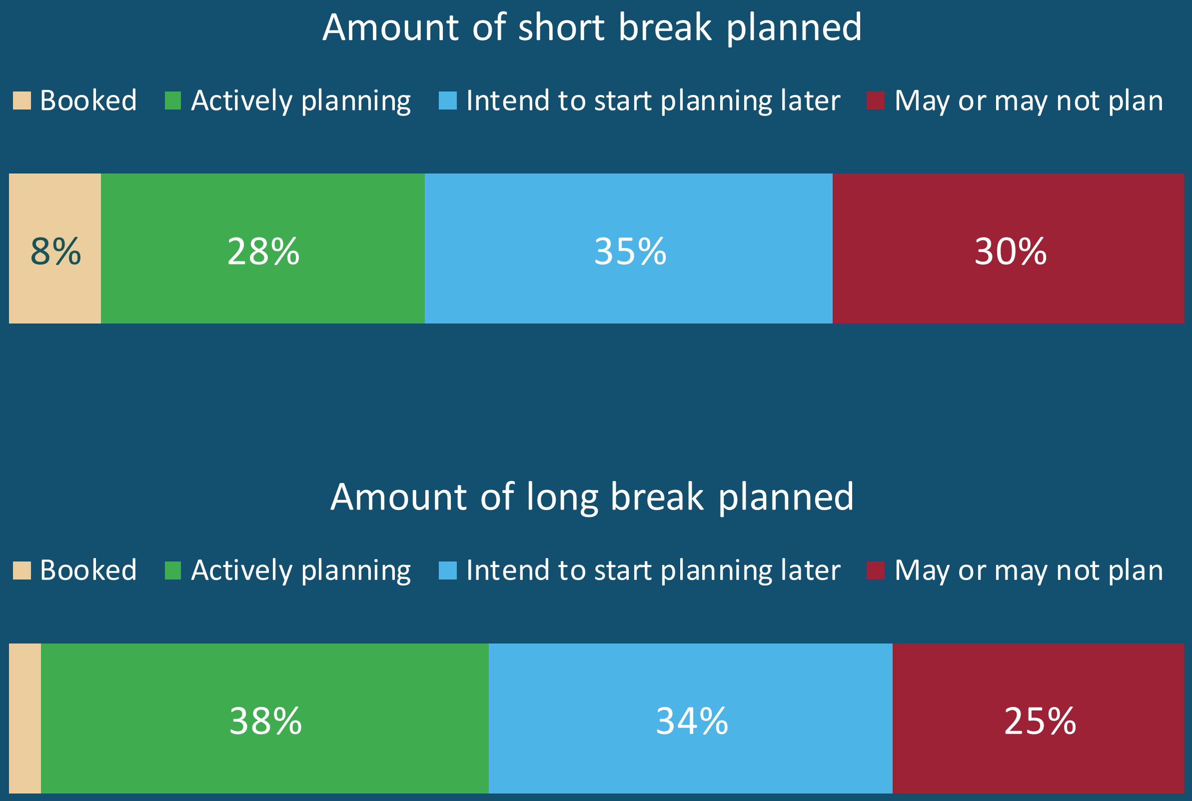


N = 400

E24a. Would you consider taking a leisure day trip in the Republic of Ireland, Northern Ireland or Britain in winter/spring 2024 (January to April)?

In winter/early spring, coastal trips remain popular. However, among the youngest cohort, city breaks are the number 1 choice for a trip





N = Those planning long or short break in early 2024

E24c Which of the following destination types would you consider in winter/spring 2024 (January to April)? E25 Thinking about the short/long trip(s) you said you would consider for winter/spring 2024 in Northern Ireland, have you booked or thought about planning this short/long trip?

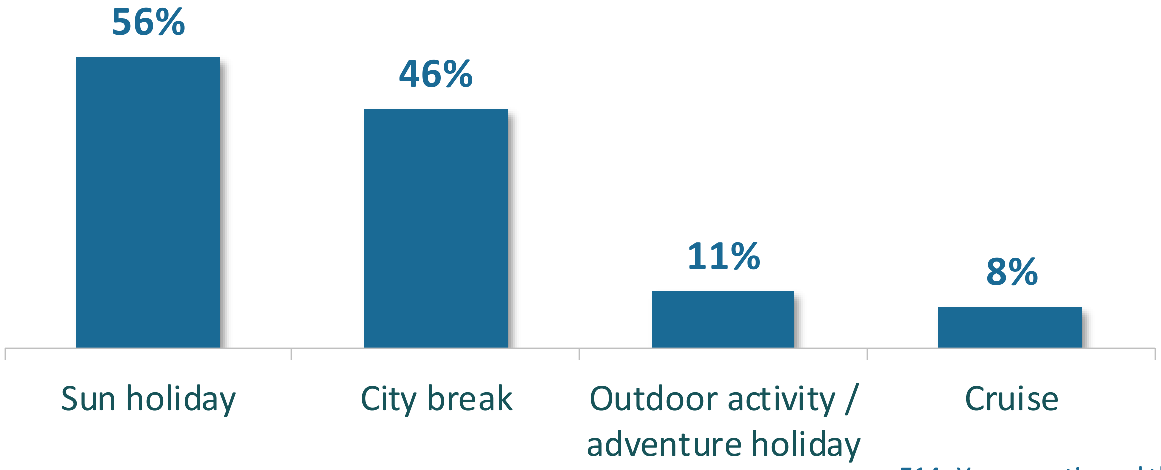
Over half of people are looking to travel somewhere for the sun with nearly a third planning to travel in April 2024

What type of trip abroad are you considering?

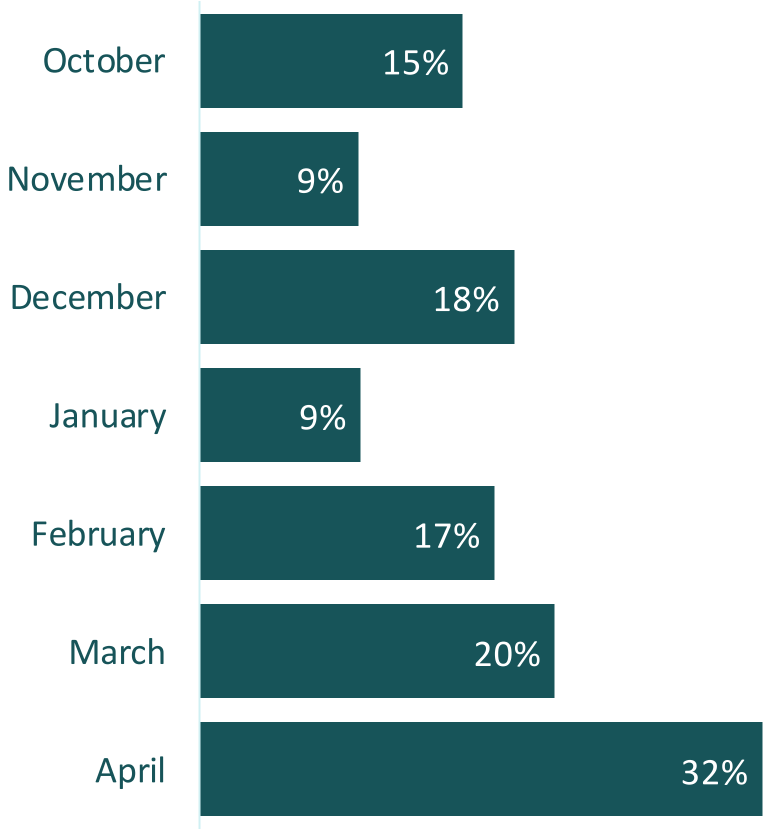
48% of total sample are considering a break abroad in the next 6 months

54% of this cohort are actively planning or have booked their trips

Under 34 more likely to be considering a sun holiday (68%)



When trips abroad are planned for



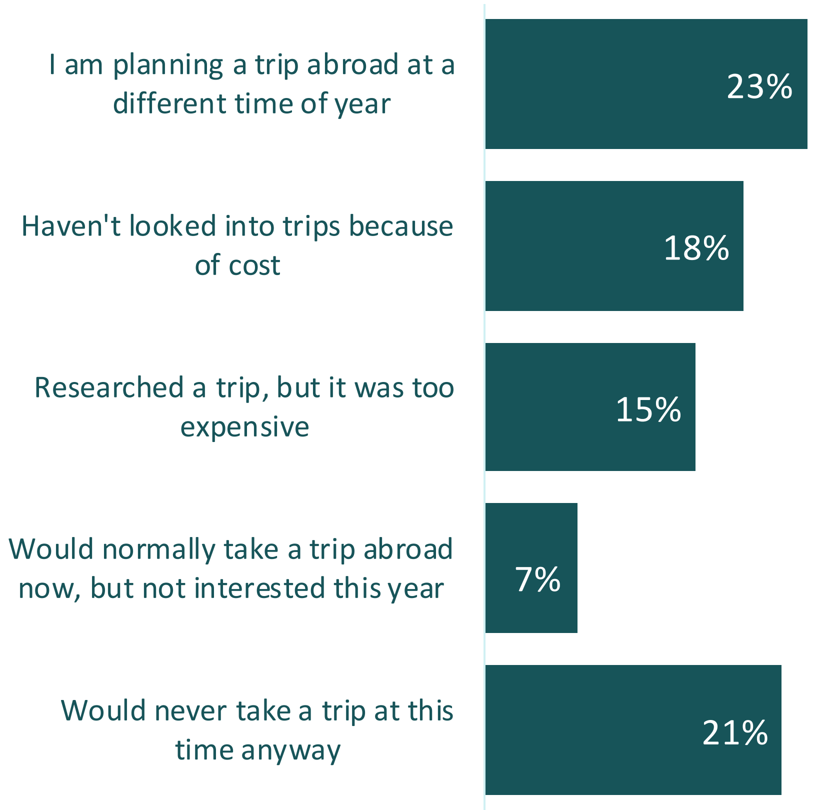
N = Those considering trip abroad

E14. You mentioned that you are considering taking a break abroad in late 2023 / early 2024 (September to April). Have you booked or thought about planning this trip abroad? / E14b And in which of the following months are you likely to take a holiday or short break abroad in late 2023 / early 2024? / E15New. What type(s) of holiday or short break abroad are you considering?

The top motivations for a trip abroad are similar to trips at home, with most looking to relax

Trip abroad motivations

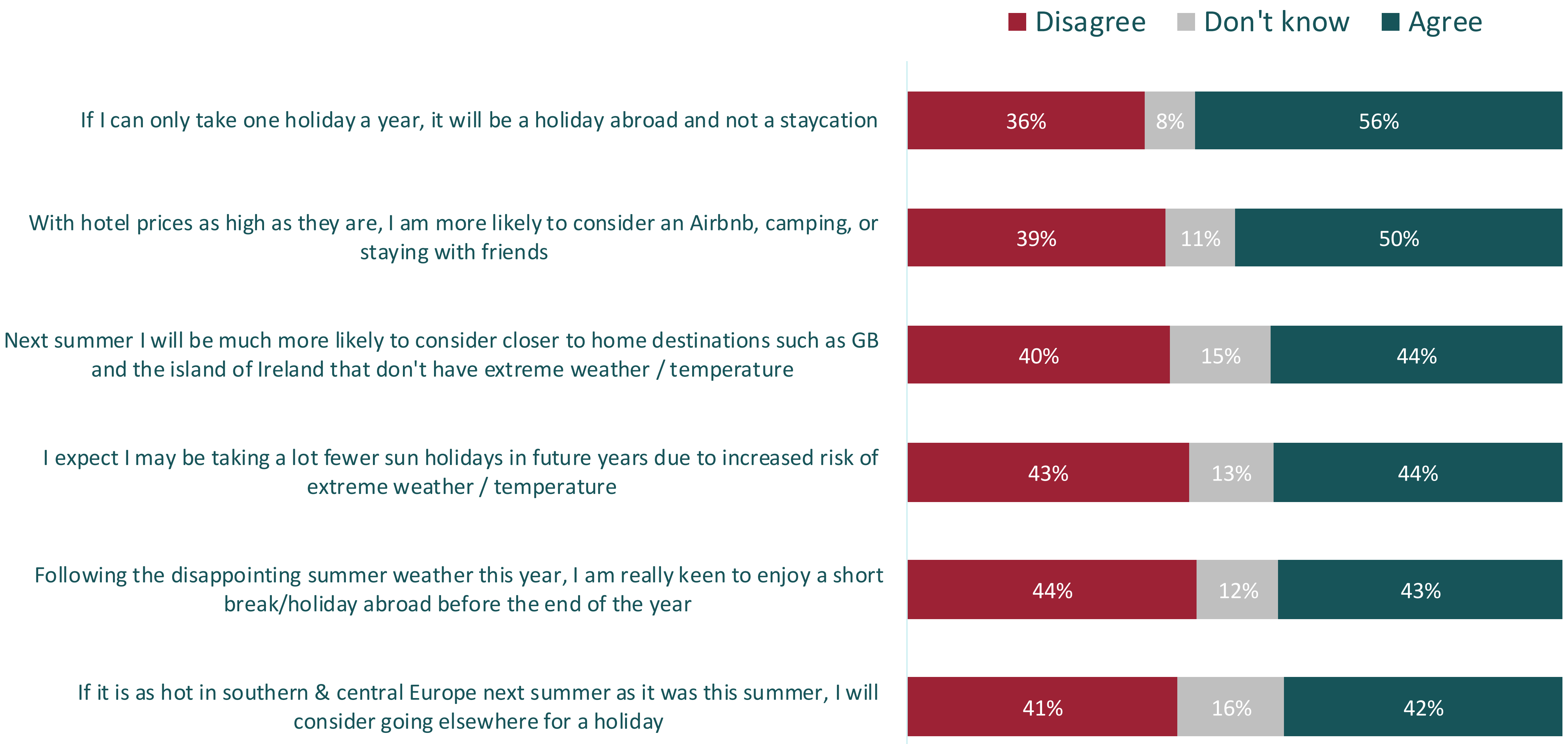
Why not planning trip abroad this spring/summer



E15bNew. What has encouraged you to consider a holiday or short break abroad in late 2023 / early 2024 (September to April)
E14c. You mentioned that you are not planning a break abroad in late 2023 / early 2024 (September to April). Which of the following best describes your reasons for not taking a break abroad?

N = Those considering trip abroad / Those not planning

Over half say that if they only go away once next year, it will be a holiday abroad



N = 400

L12 To what extent do you agree or disagree with the following statements?

Market comparison – Trip expectations

Short break intentions for the domestic market have dipped for the next 3 months

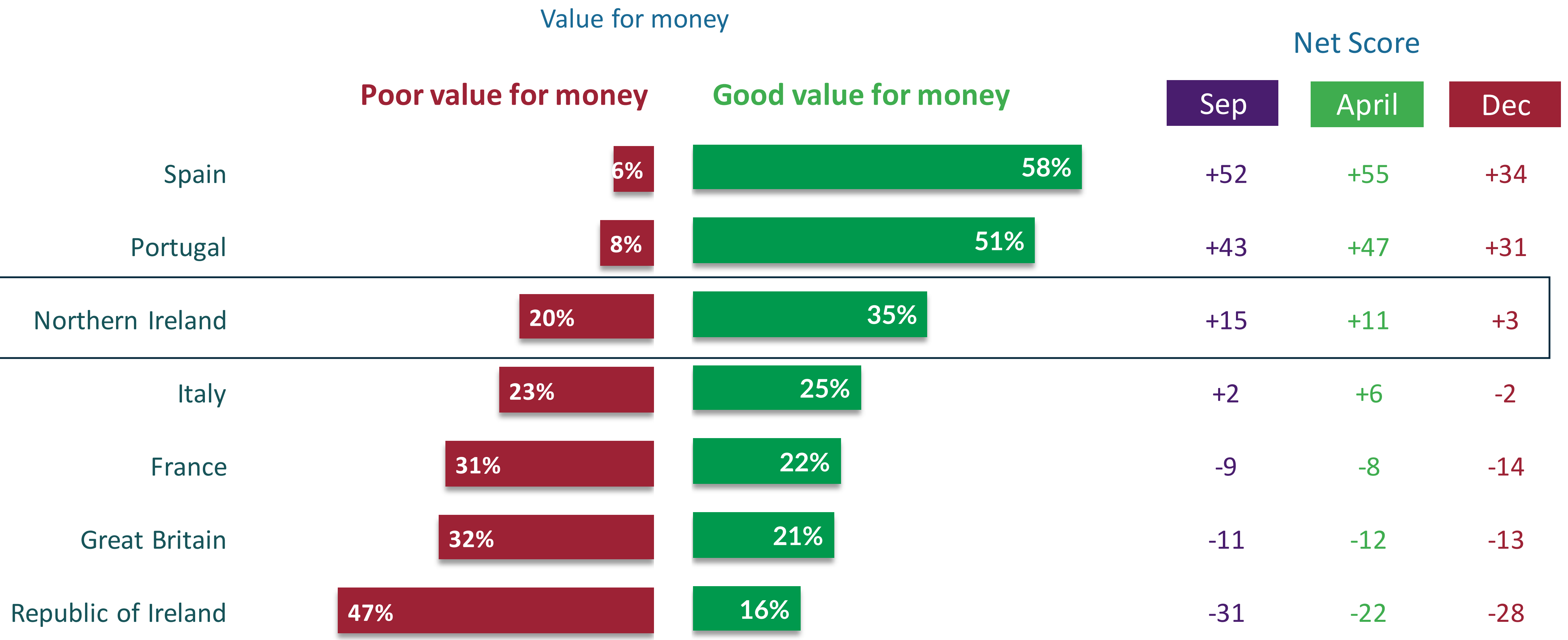
- Trip intentions for those in NI travelling in NI are down vs. this time last year, this is true for day trips as well as longer trips. We see the same pattern for those from ROI travelling within ROI.
- To relax and unwind and to have fun are key motivators for intended NI trips for the domestic market.

We do see a key different in the types of trips each market is taking within NI

- For those in the ROI, they are most likely to consider a city break within NI, 3 in 4 state that a city break is their preference when travelling to NI.
- For those travelling within NI they are most likely to prefer a coastal holiday (63%) in NI, however, they do show a wider variety of preferences.

Value for money

Value for money score continues to increase for NI – and drops back for ROI vs. April

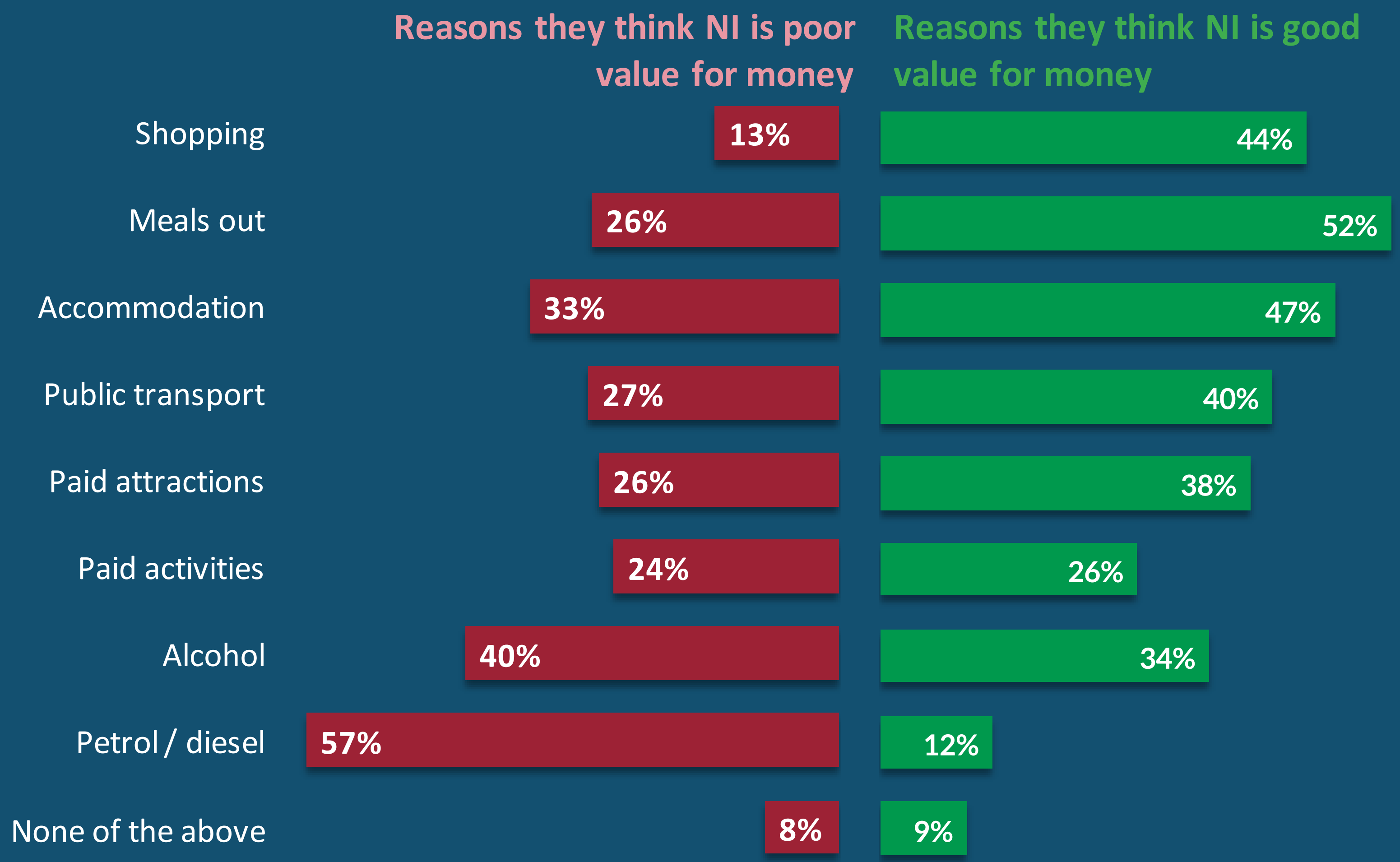


N = 400

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

Shopping and meals out seen as having strongest value for money – with meals out increasing vs. last wave. Paid activities drops in VFM perception however

Why they think NI is poor or good value for money as a holiday or short break destination



Net score

	Sep	April	Dec
Shopping	30%	22%	25%
Meals out	26%	21%	20%
Accommodation	14%	8%	-6%
Public transport	13%	11%	10%
Paid attractions	12%	11%	14%
Paid activities	2%	7%	-8%
Alcohol	-6%	0%	-11%
Petrol / diesel	-45%	-42%	-46%

N = 400

C3. Which of the following do you think represent poor / good value for money when it comes to Northern Ireland as a short break or holiday destination?

Market comparison – Value for money

Improvements in VFM for the NI market but a decrease within the ROI market

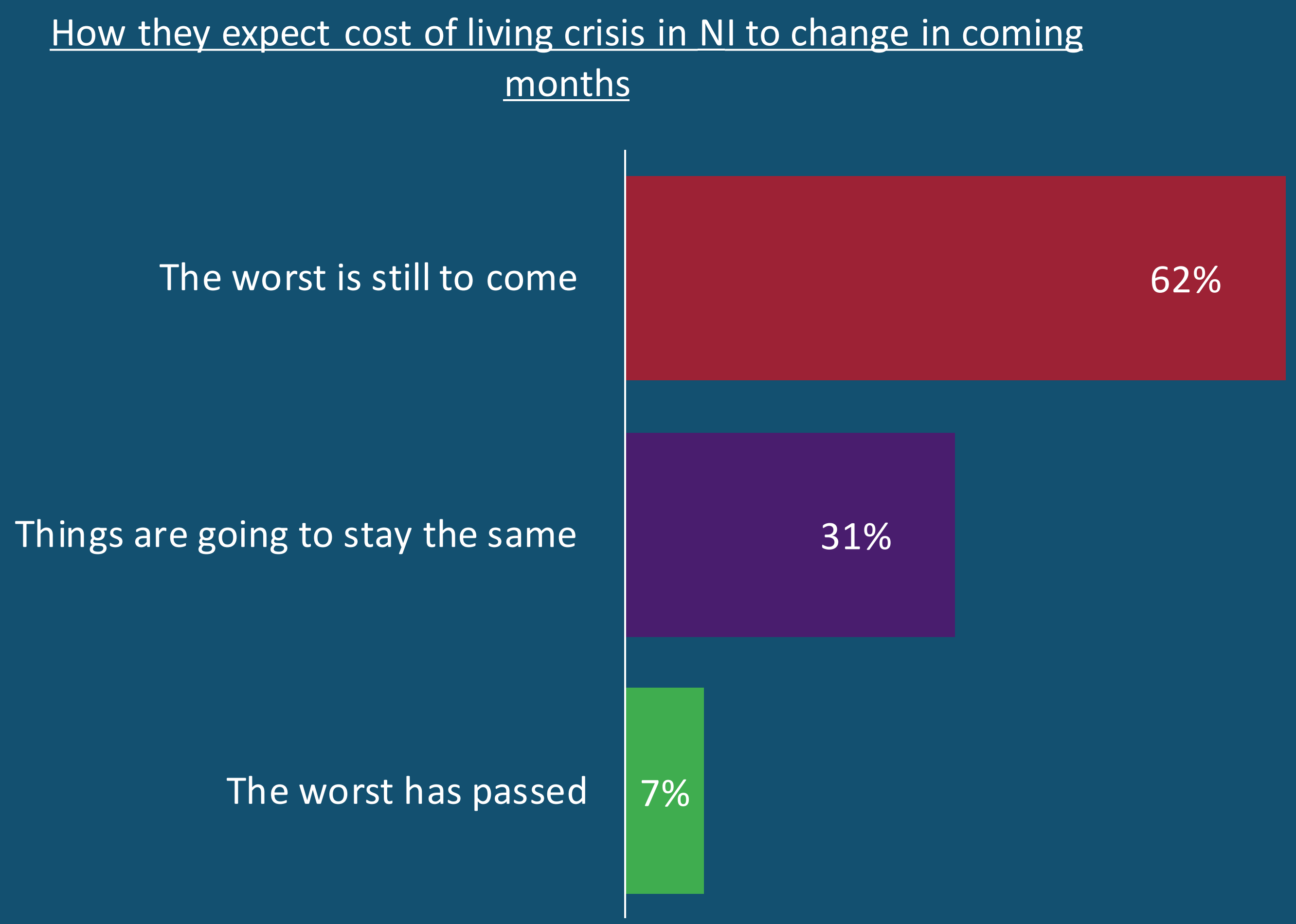
- **Net VFM scores continue to increase for those in NI with a score of +15, compared to a score of -13 in ROI, showing a decrease from the previous wave. Both markets continue to see Spain and Portugal as representing the best VFM.**

Accommodation is the main differentiator between both markets

- **In NI accommodation ranks as 3rd in representing good value for money but within the ROI market, it ranks 7th with only fuel ranking lower.**

Cost of living

Cost of living expectations are very negative – 3 in 5 say the “worst is still to come” in the coming months



N = 400

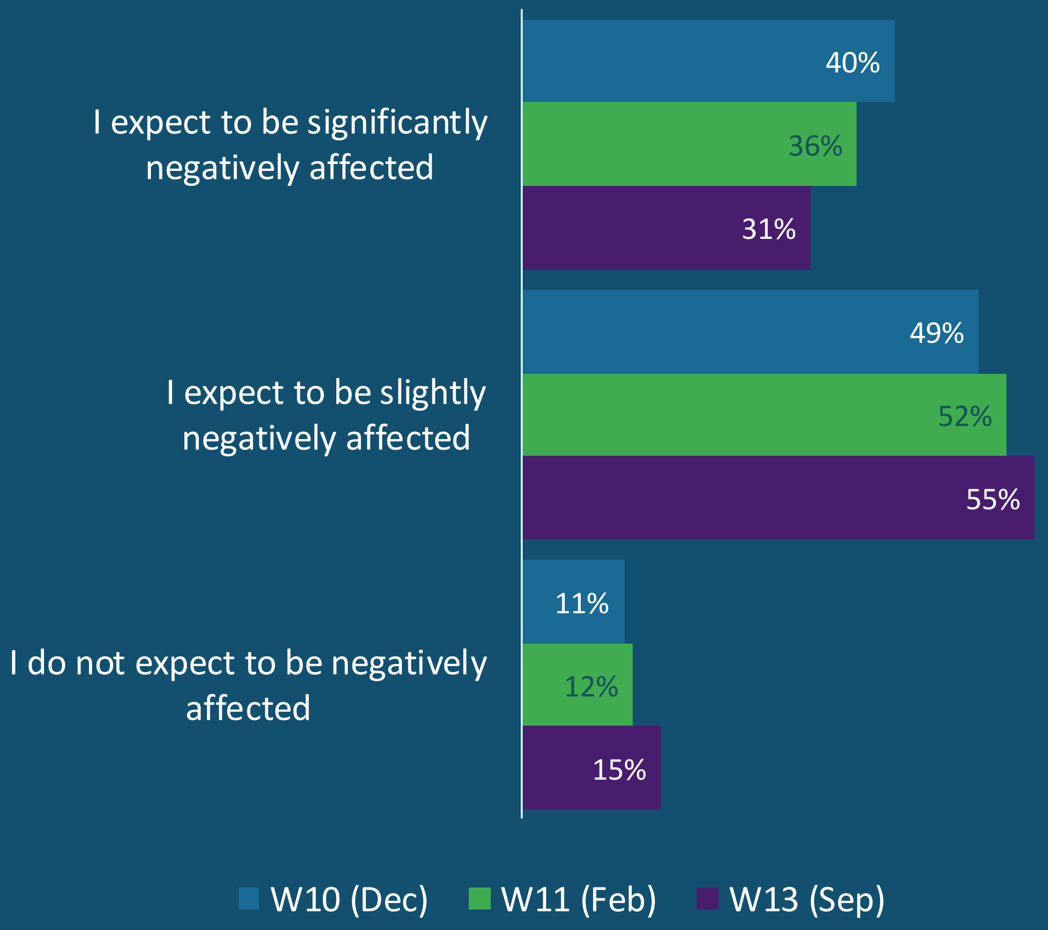
F2 Over the coming few months, how do you think the cost of living crisis is going to change in Northern Ireland?

Number expecting to be "significantly" affected drops by 5% - but most still expect some impacts from cost of living in coming months

85%

expect to be affected by cost of living increases

Extent to which people feel they will be financially affected by cost of living increases

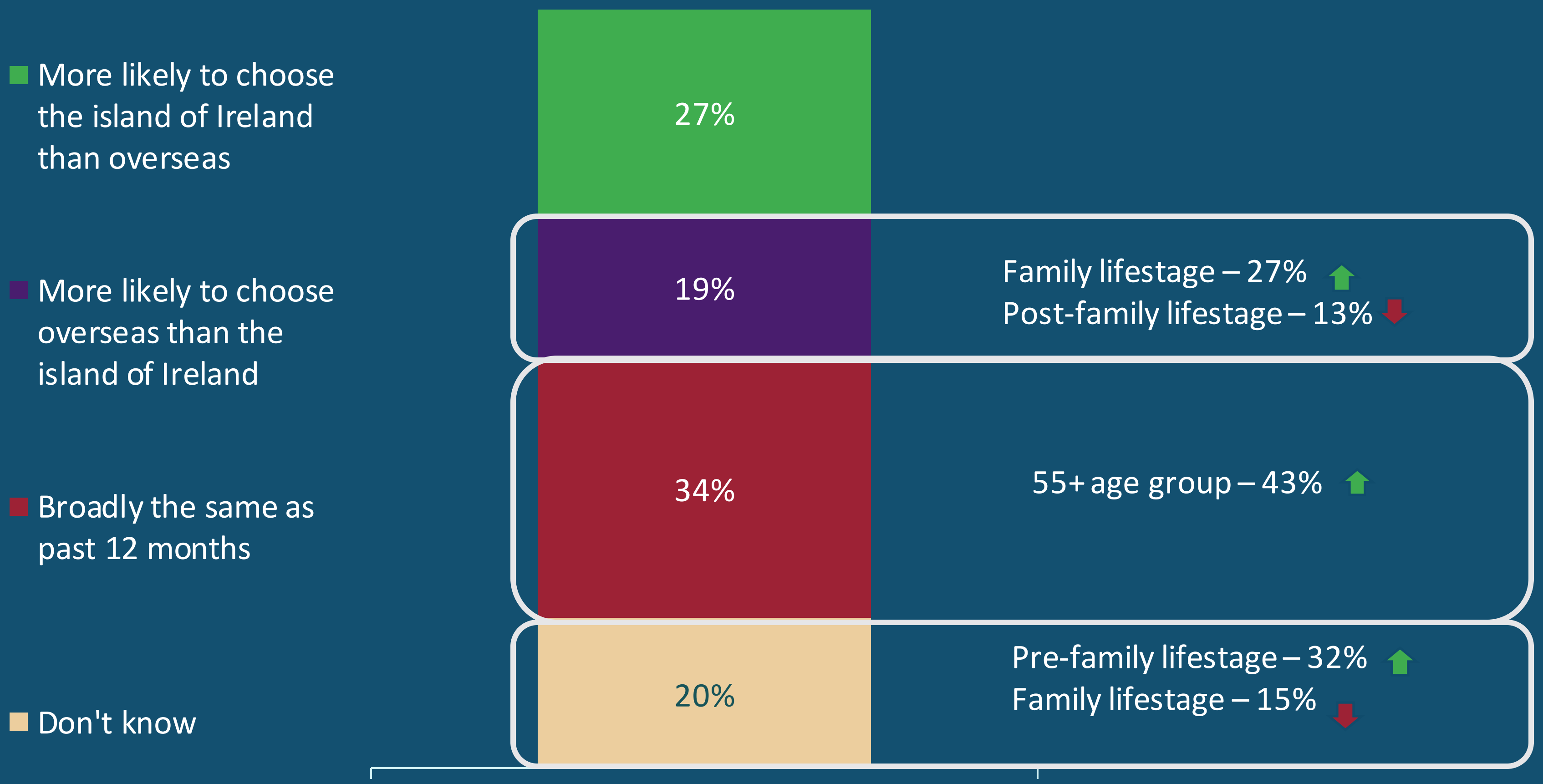


N = 400

F1 To what extent do you expect to be financially affected by cost of living increases in the coming months?

One third of people will holiday similarly in the next year – but more people are likely to choose the island of Ireland over going abroad

How people expect their short breaks/holidays in the next 12 months to compare to the last 12 months

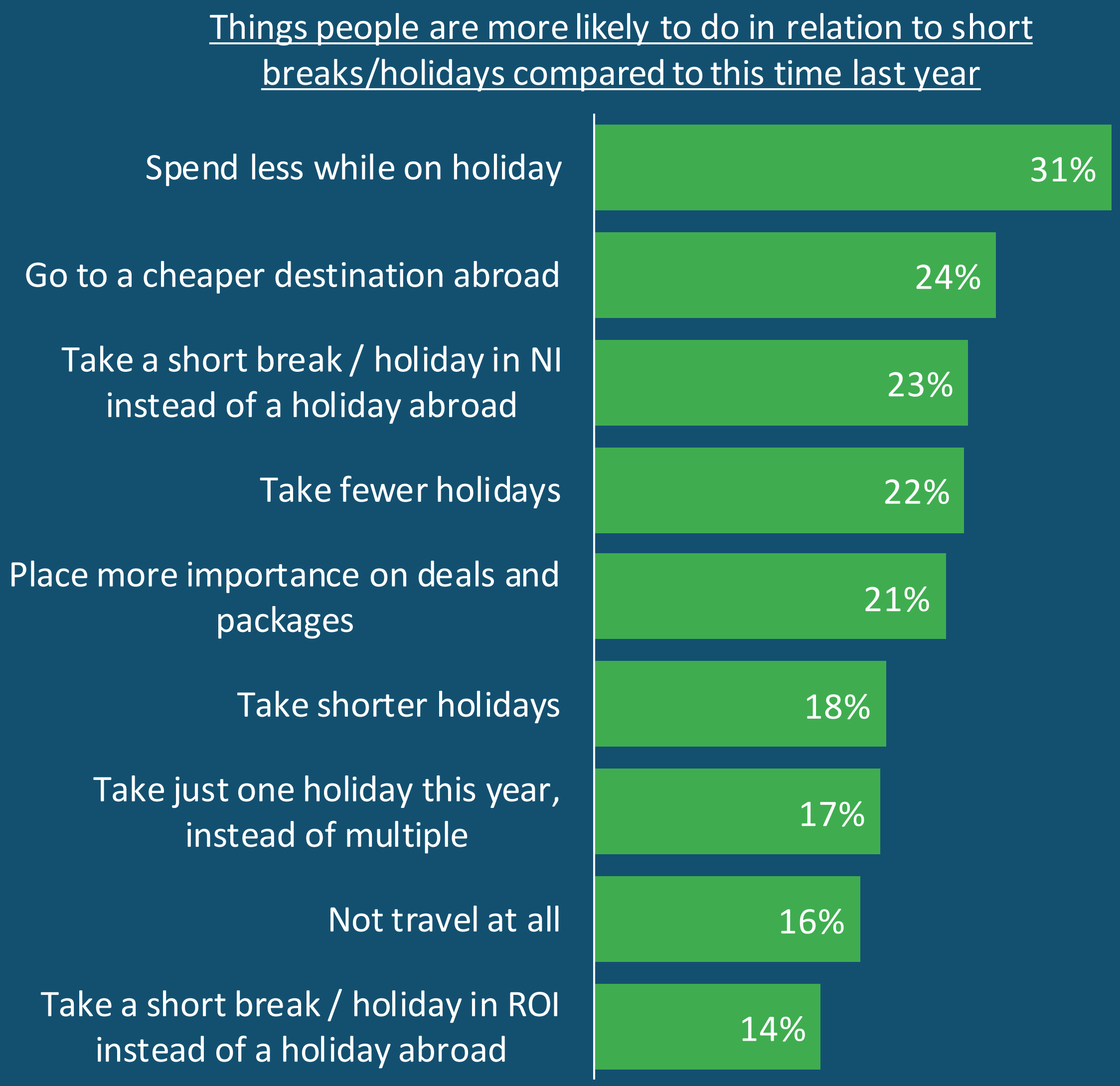


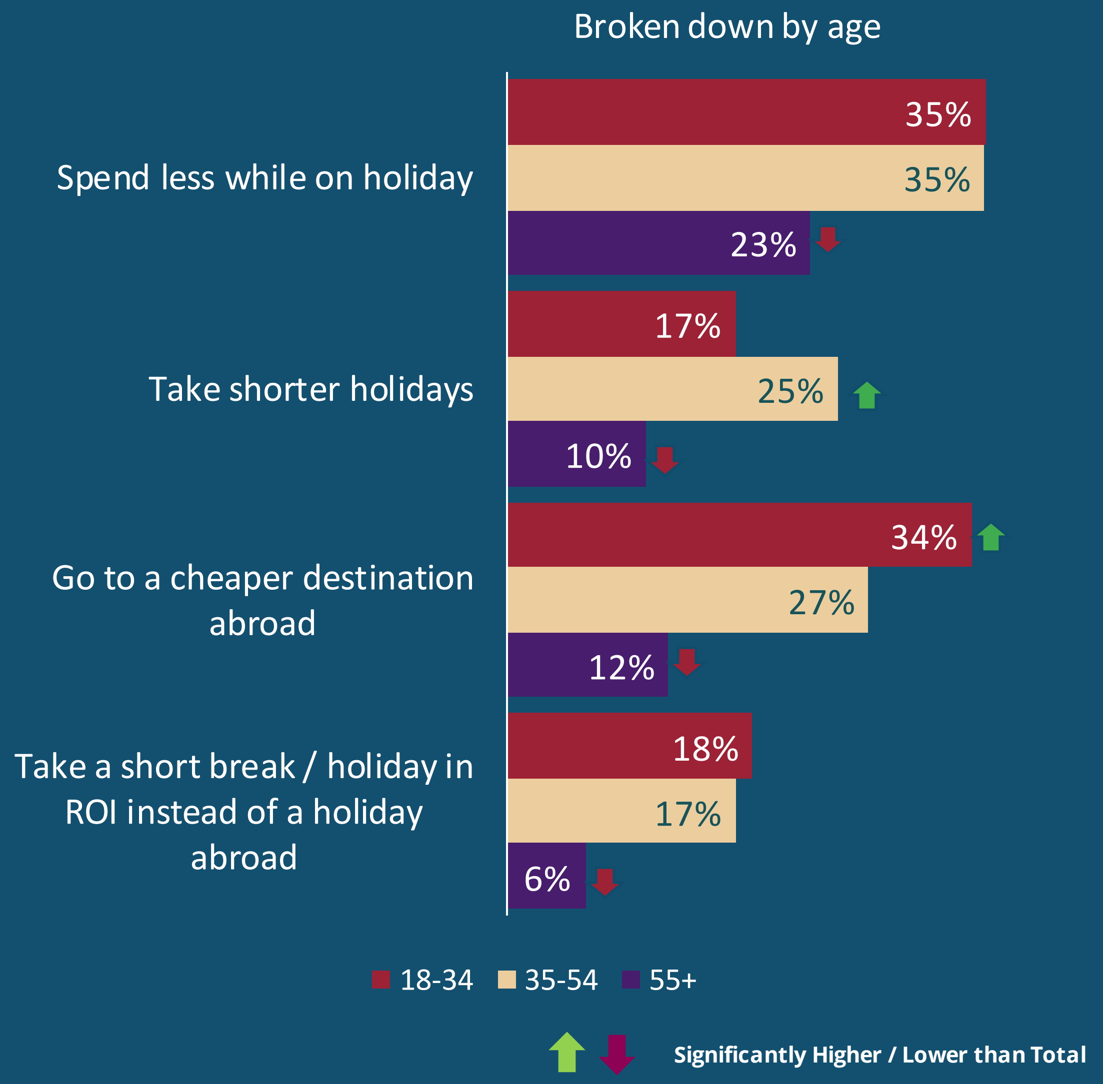
Significantly Higher / Lower than Total

N = 400

F3 Thinking of the next 12 months, how different do you think your short break/holiday choices will be compared to the last 12 months?

Spending less while on holiday is the most popular money saver. Those in the 55+ age group are much less likely to make changes in relation to their holidays and short breaks

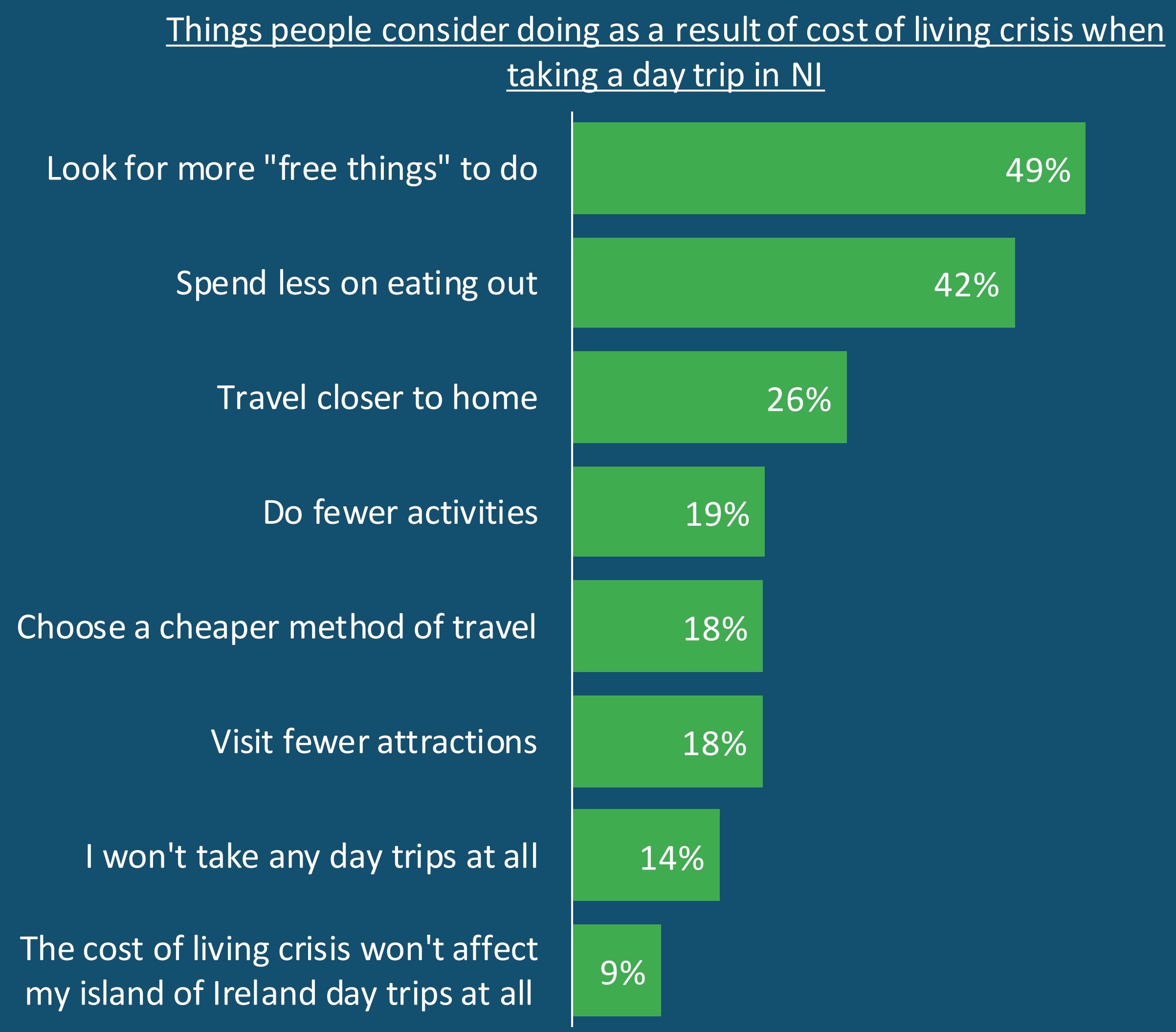


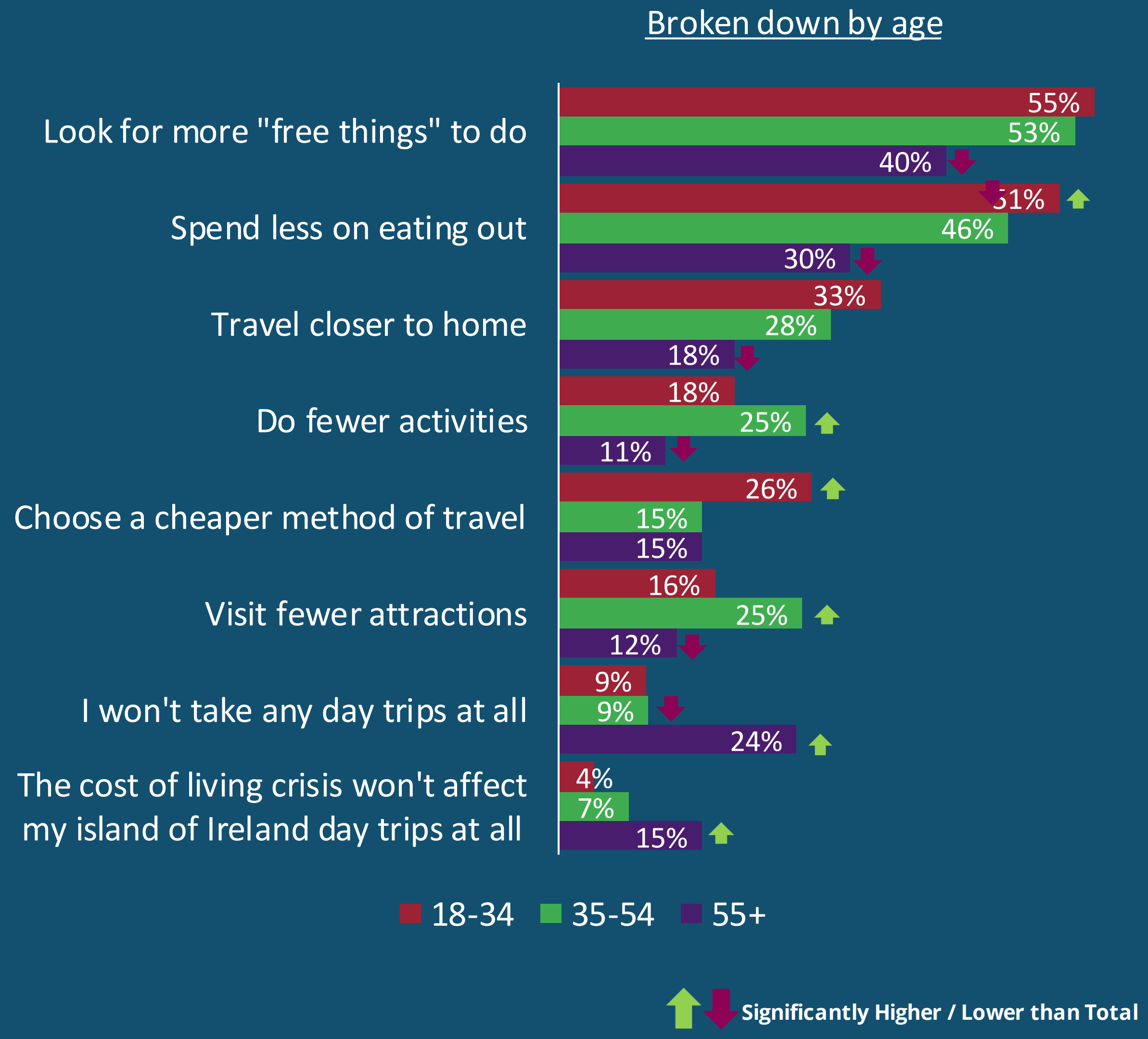


N = 400

F6 Compared to this time last year, which, if any, of the following are you more likely to do in relation to holidays and short breaks?

Free activities and spending less on food are the most considered options when planning a day trip to NI as a result of cost of living



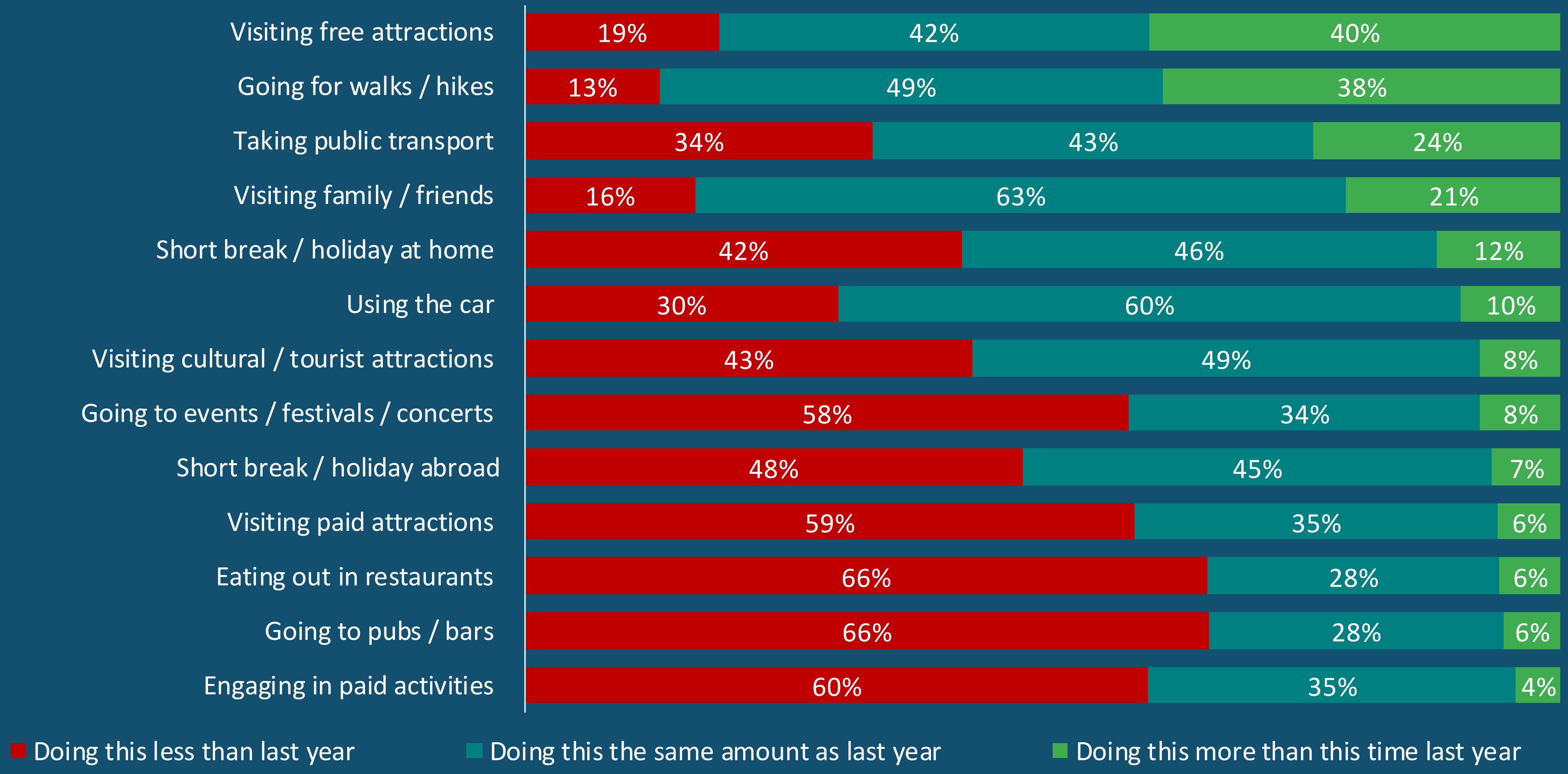


N = 400

F7 Which of the following would you consider doing as a result of increases in cost of living if planning a day trip in Northern Ireland in the next few months?

Most are cutting down on visiting food and drink venues with some opting for more free activities such as free attractions and walking/ hiking

Things people are more/less likely to be doing this Autumn/Winter period



N = 400 (does not include N/A answers)

F8 Compared to this time last year, which of the following are you likely to be doing more or less of over this autumn / winter period (October to December 2023)?

Market comparison – Cost of living

Both markets are equally as impacted by the cost of living crisis. However, ROI are more likely to travel oversees compared to NI

- Around 9 in 10 in each market say they expect to be impacted by the cost of living crisis.
- We do see that those in NI are more likely to travel within the Island or Ireland compared to ROI consumers who say they are more likely to travel overseas.

In terms of cutting costs both markets share key similarities but also some key differences

- Both markets are looking to spend less on holiday as well as go to cheaper destinations, However those in NI are much more likely to say they will consider NI over overseas compared to ROI.
- When considering day trips in NI around half are looking for free activities. Similar to longer trips NI are more likely to travel closer to home than those in ROI.