

Consumer Sentiment NI Market April 2021



Research background and objectives



Research Background & Objectives

With the fourth wave of the consumer sentiment barometer, we have assessed the evolving 'consumer mood' towards Covid-19 and attitudes to travel, while also focusing in on the **impact of vaccines** on travel intent.

The research objectives:

Determine the current consumer sentiment towards Covid

Explore current attitudes towards travel

Assess the impact of vaccines on travel intent



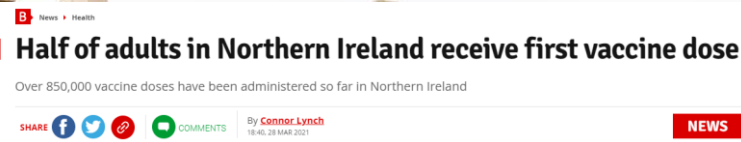
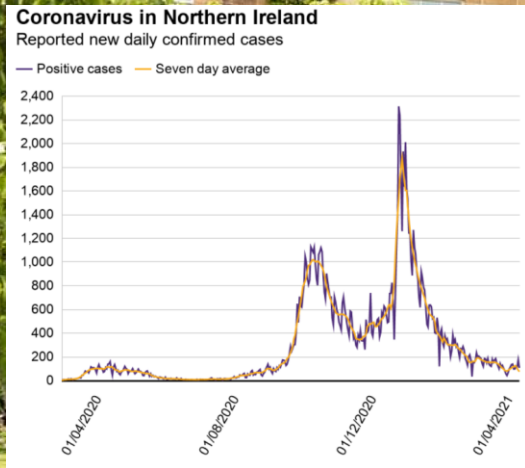
What was happening during fieldwork?

FW Dates 23rd Mar – 6th Apr

Case numbers
have fallen

AstraZeneca
Blood clots

28th Mar



4th Apr

Belfast Telegraph News Opinion Business Sport Life Entertainment Travel SundayLife

Thirty petrol bombs thrown at police during Newtownabbey riot

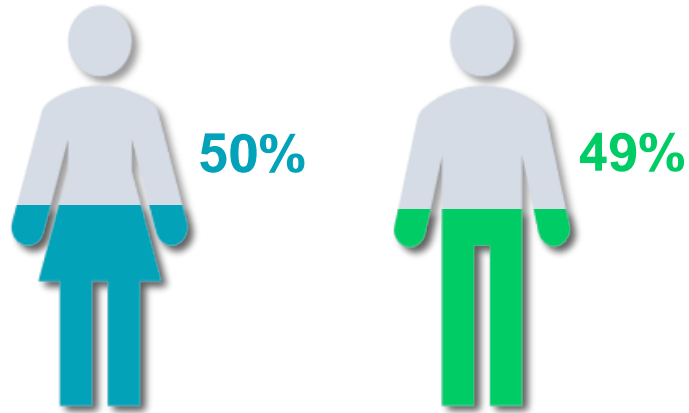
30th Mar



We interviewed a robust, nationally representative sample in Northern Ireland

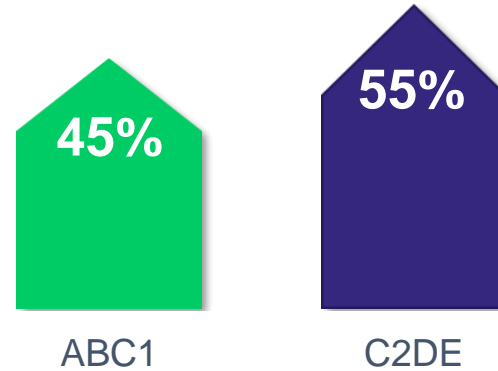
Total sample = 400

Gender



1% prefer not to say/ describe as something else

Social Grade



Age



Life-stage

PreFamily 25%

Young family 7%

Middle Family 10%

Older Family 20%

Empty Nesters/ Older (45+) no kids 38%

Region

Rest of NI 61%

Belfast/greater Belfast 39%



Key takeaways

Clear sense that we are over the worst of the Pandemic

- However, anxiety levels are still heightened as fear of contracting Covid is the top cause of concern
- Improvements in sentiment likely influenced by efficient vaccine roll out

Appetite to travel has increased in the last month

- Driven by pent up demand amongst younger groups and young/mid families
- Targeted safety comms will build confidence amongst older groups
- Intention to take breaks in NI is up significantly – encourage people to book and commit to NI – dial up value, safety, flexible booking & opportunity to unwind

Sustainability will be more of a consideration post covid

- Fewer looking to travel outside NI, may lead to a healthier domestic market in LT
- Sustainability is a growing consideration for tourists – Domestic tourism likely to benefit from more making the decision to fly less
- Important for businesses to future proof their operations i.e. positive impact on local community/environment

While willingness to book events is higher in NI than ROI, many still not ready

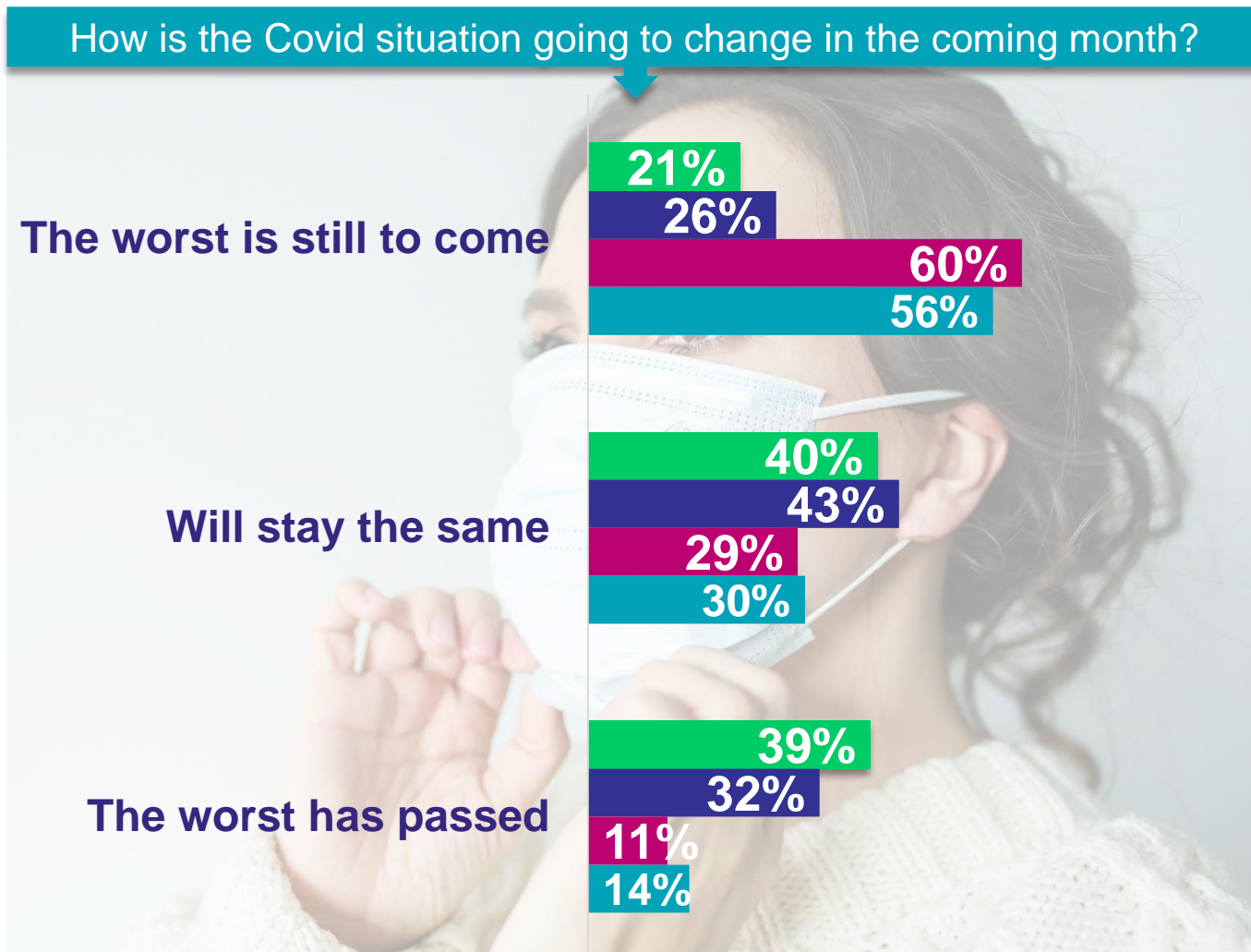
- Most potential in small outdoor events for this summer – younger groups and males most likely to book events
- Willingness to book events only slightly higher in NI compared to in ROI
- Multiple safety procedures and precautions must be in place for people to feel safe attending an event

Covid-19 and Tourism




Pessimism is lessening, with ABC1s & older groups most positive


Clear sense that we are over the worst of the Pandemic



More negative outlook among mid families (43%) and 18-24 year olds (38%)

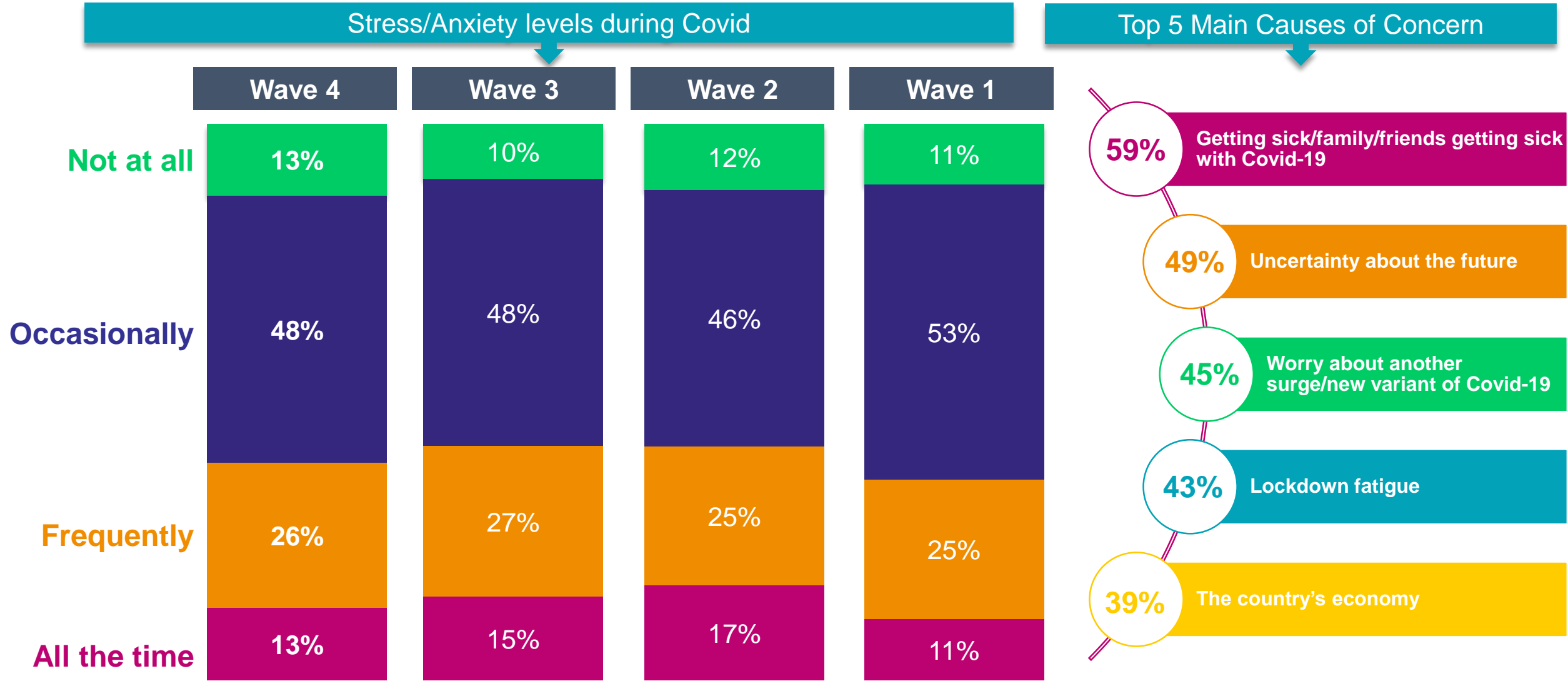


More positive outlook among 44+ years-old with no kids (47%), ABC1 (45%) and Quality seekers (44%)



Base n = 400

Anxiety levels remain relatively unchanged – Safety reassurance is still required to lessen worries of contracting Covid-19



Base n = 400

Q1b How would you describe your stress and anxiety levels during Covid-19?/Q2 What are the main things which are causing you to feel anxious/ concerned?

Older cohorts need safety reassurance while positioning breaks in NI as an opportunity to de-stress will resonate with Females

Groups with the highest levels of Anxiety

Those feeling concerned/anxious frequently or all the time



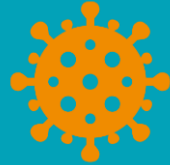
Older Family



Females



25-34 year olds



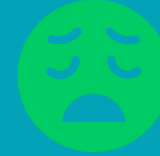
Getting sick/family/friends getting sick with Covid-19



80% 65+ yrs

68% Quality Seekers

65% Females



Worry about another surge /new variant of Covid-19



62% 55+ yrs

51% Quality Seekers

51% Young Families



Uncertainty about the future

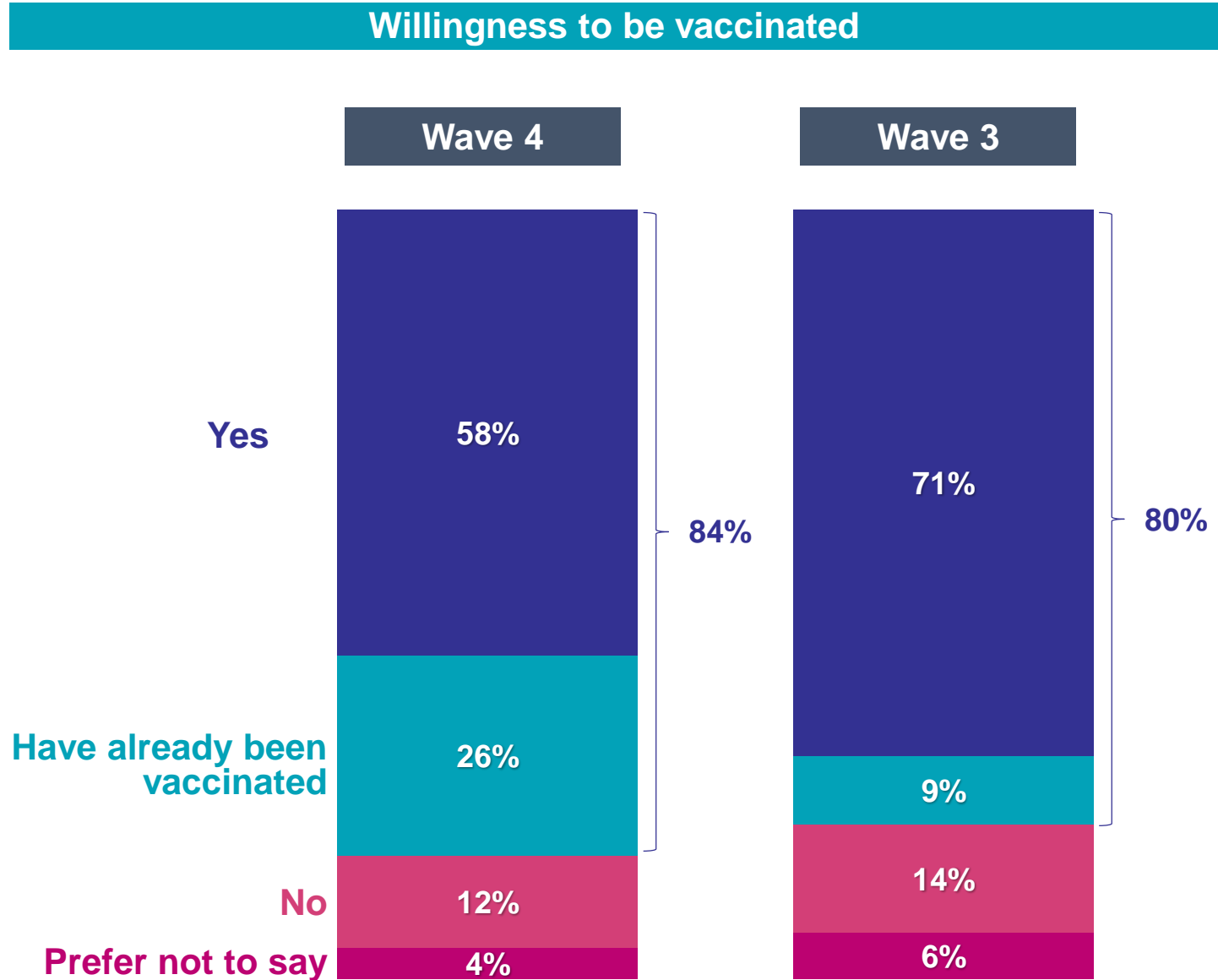


55% ABC1

52% Females

Base n= 400

Good News! There's been a big jump in the number of people who have been vaccinated since wave 3



Base n= 400

Q3. If a Covid-19 vaccine is made available to you, will you get vaccinated?

Market Comparison

Covid-19 & Tourism

A sense of optimism and stress levels are in similar place in both NI and ROI

Lockdown Fatigue a bigger driver of anxiety/concern in ROI

Suffering from Lockdown Fatigue: NI Residents 43%
Vs ROI Residents 55%

Current Attitudes towards Travel



General appetite to travel has increased since wave 3 – Opportunity now to prompt people to think about NI breaks

Attitudes Towards Tourism – Agreement with Statement



Exploring holidays ideas in general is up

Base n= 400

Q4. To what extent do you agree or disagree with the following statements in relation to travel this year.

Good News! Openness to exploring ideas for an NI holiday is growing, highest amongst young/mid families however we have seen a big jump amongst Social Instagrammers – TNI need to tap into their openness

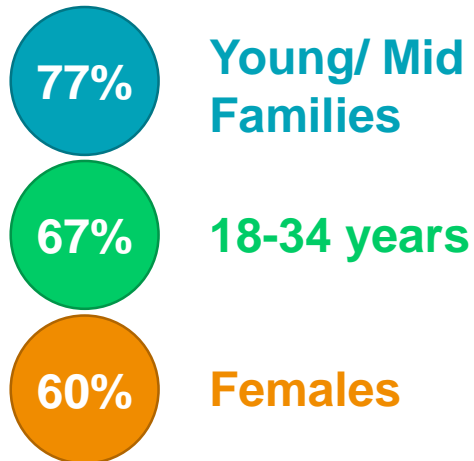
Openness to Explore ideas right now for a holiday in Northern Ireland this year

54%

Now open to exploring ideas right now for a holiday in NI this year

Up 7%

Highest Amongst



Social Instagrammers

64%

+18%



Aspiring Families

64%



Quality Seekers

37%

W3

46%

59%

36%

Base n= 400

Q4. To what extent do you agree or disagree with the following statements in relation to travel this year.

Desire to travel abroad this year

Stayed at home in 2020
so would like to travel
abroad this year

Wave 4

44%

Wave 3

38%

Highest Amongst

49%

• Males

61%

• 18-34 year-olds

56%

• Social Instagrammers

Lowest Amongst

Empty Nesters – 26%

55-64 year-olds – 35%

Younger cohorts and
males have the
strongest desire to
travel abroad

Efforts need to be
made to ensure we
don't lose these
cohorts

Base n= 400

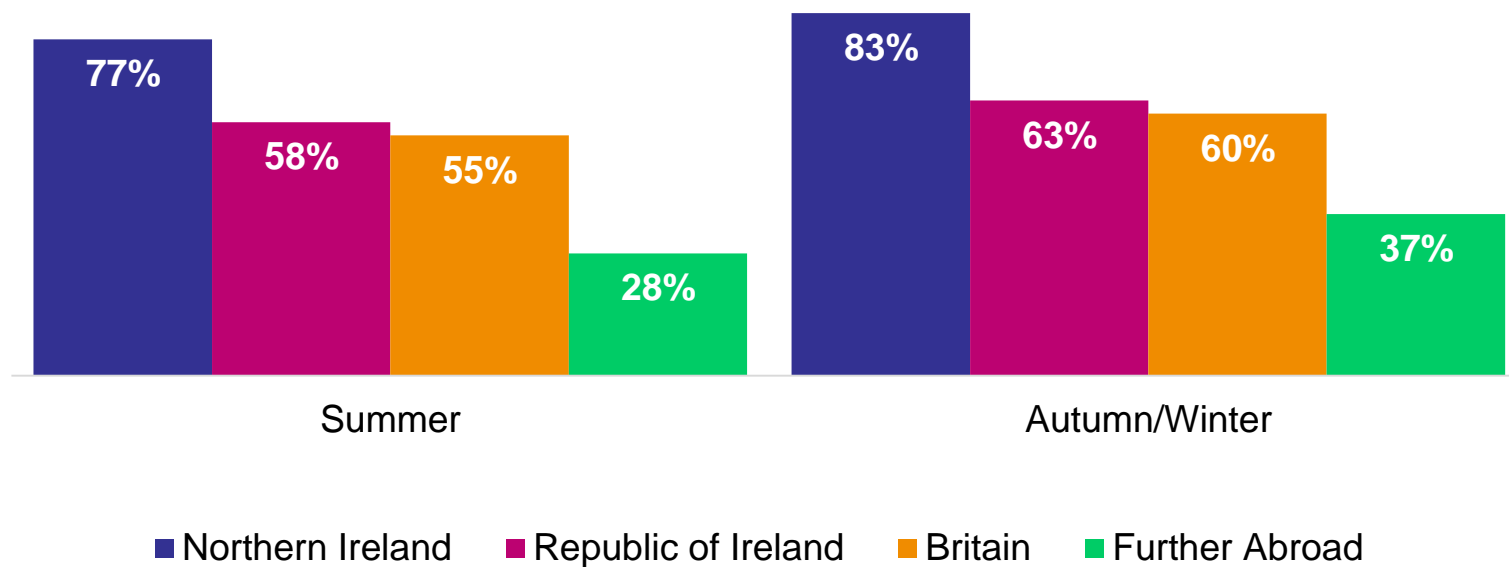
Q4. To what extent do you agree or disagree with the following statements in relation to travel this year.

Staycations in NI are seen as the safest bet, while ROI and Britain are on par with each other

Competition with other holiday destinations will increase as the year progresses



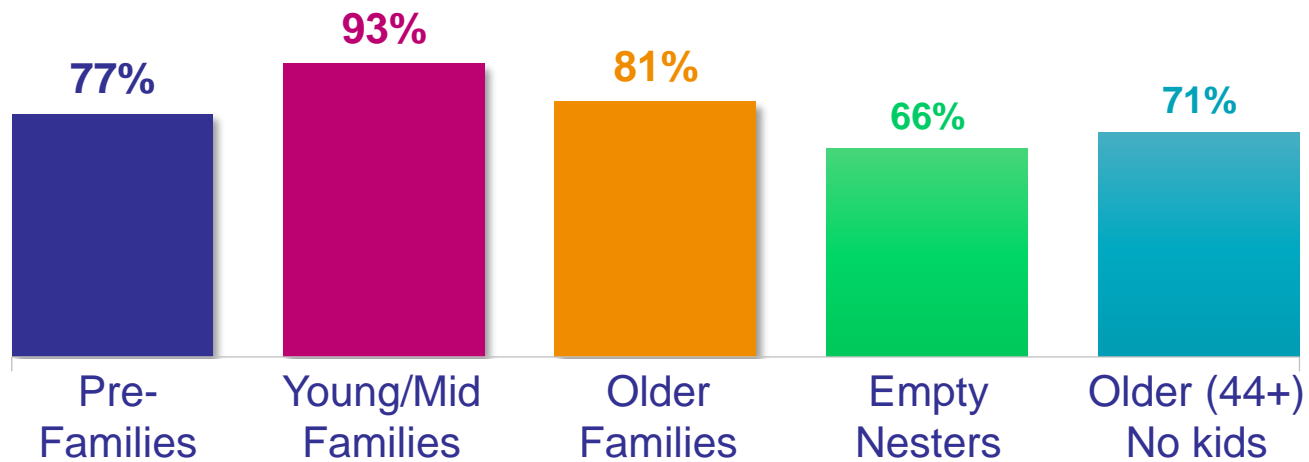
How safe would it be to go on holiday in...



Targeted communications to older cohorts needed to reassure them of the safety of taking breaks in NI

Base n= 400

Safety Perceptions of Northern Ireland Breaks this Summer X Groups



Social Instagrammers

77%



Aspiring Families

87%



Quality Seekers

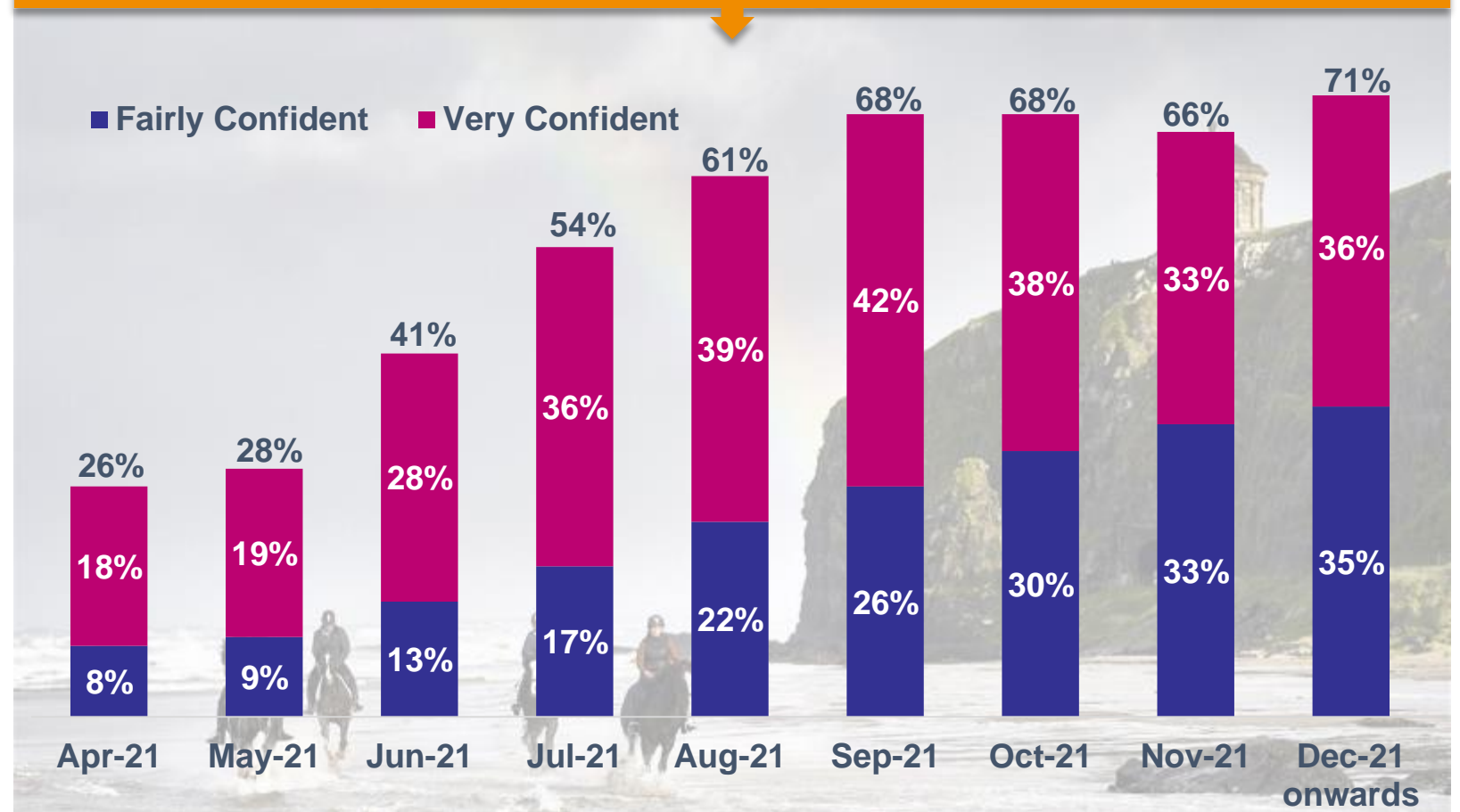
68%

Confidence picking up in July & August - Industry needs to be ready for increased bookings in these summer months

From July onwards over half feeling confident that a holiday in NI could happen

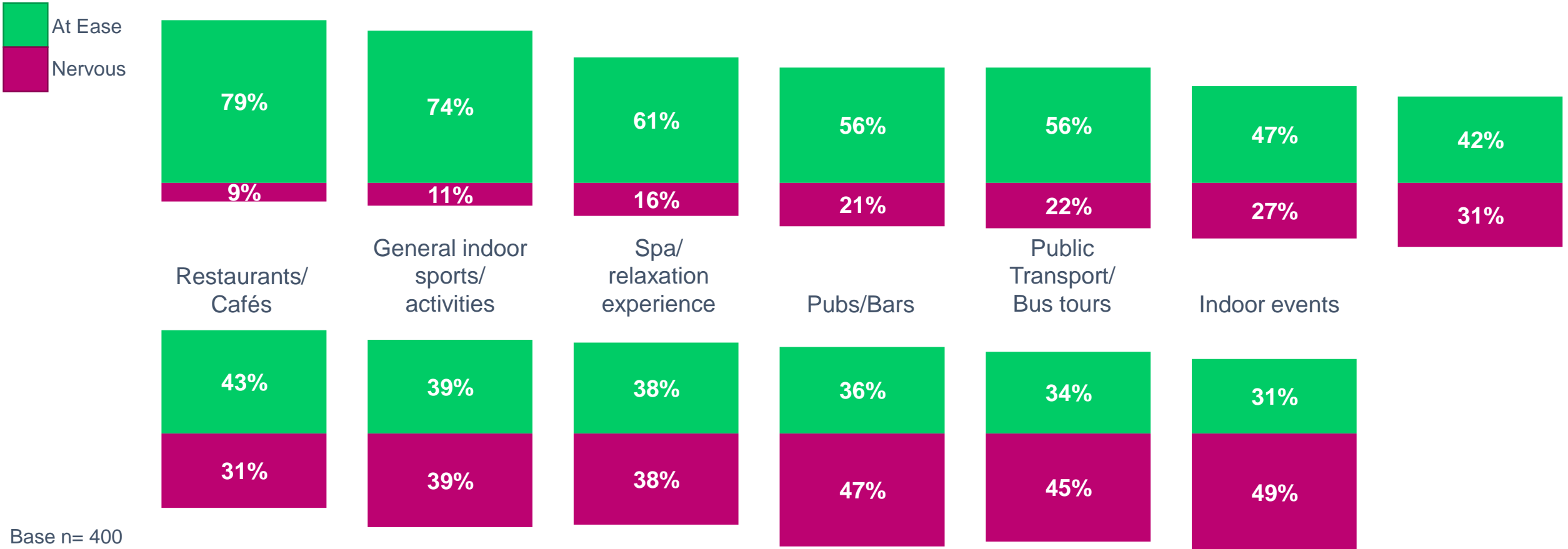
Highest amongst 18-34 year olds (66%) and young/Mid families (67%)

How confident are you that you would be able to go on a break in Northern Ireland in...



While most will feel at ease in engaging with outdoor activities this summer, crowded confined spaces still a safety concern

Ease in engaging with activities this summer



Base n= 400

Q8. When restrictions begin to ease and places start to re-open, how would you feel about engaging in these activities this summer?

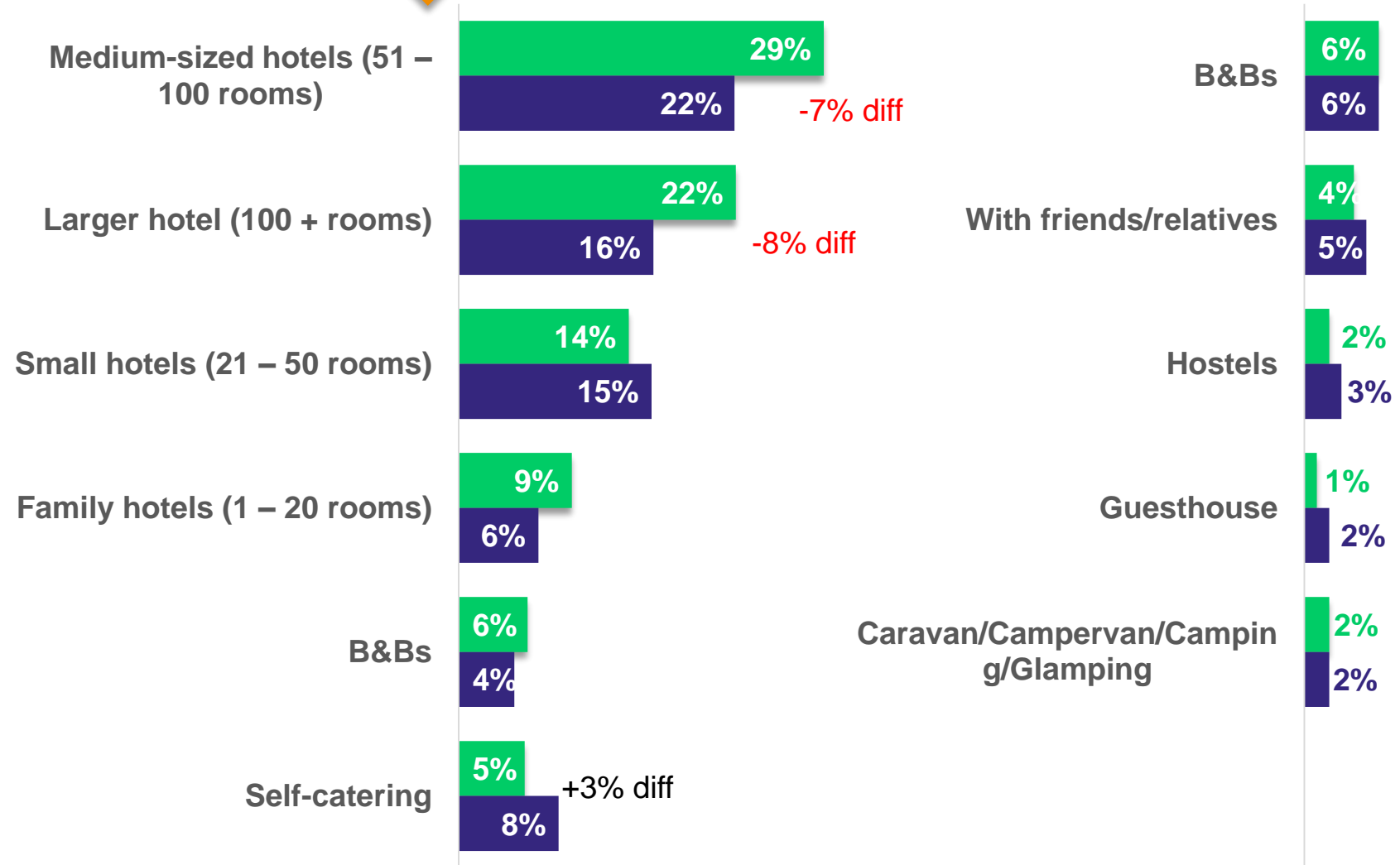
Important for medium/larger hotels to reassure potential visitors as they are most at risk of losing customers over safety concerns

Normally Stay when taking short breaks Vs. Feeling most safe in

█ Normally stay in
█ Feel most safe



74% normally stay in hotels, while 59% would consider them the safest option



Base n= 400

Market Comparison

Current Attitudes towards Travel

Confidence that the pace of the roll out of the vaccine will allow for holidays abroad this year is still higher amongst NI residents

Agreement: NI Residents 33% Vs ROI Residents 21%

Future booking confidence is higher amongst NI residents than ROI residents

54% of NI residents are confident that a domestic booking won't be cancelled in July – this drops to 44% in ROI

Value for Money



Perception of VFM in NI is relatively healthy, particularly relative to ROI – Key advantage that needs to be leveraged

Value for Money

Poor Value for Money

Good Value for Money

Net Score

W4 W2

Spain

11%

50%

+39

+29

Northern Ireland

18%

41%

+23

+33

Great Britain

25%

28%

+3

+15

Italy

26%

23%

-3

-1

France

34%

23%

-11

-7

Republic of Ireland

36%

22%

-14

+1

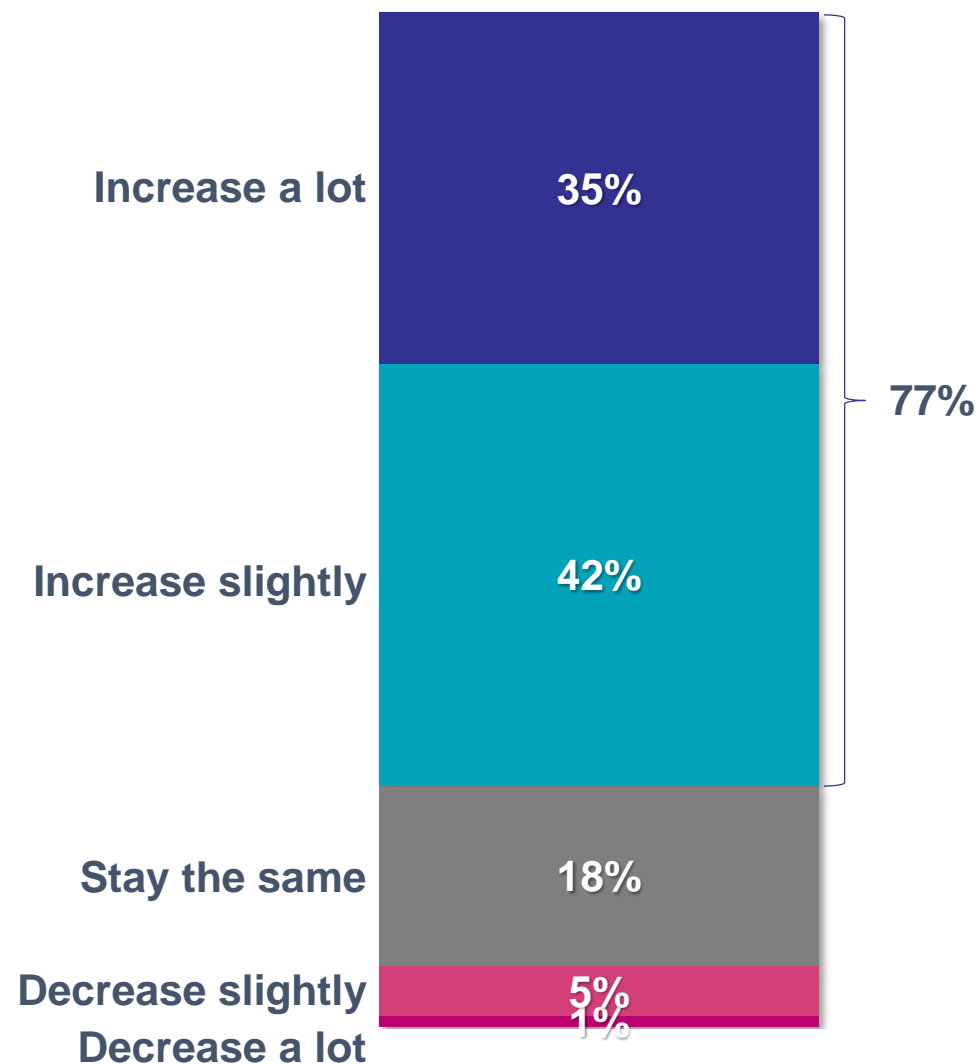
Base n = 400

Majority expect the cost of international travel to increase post Covid

Potential to highlight this pain point when promoting Northern Ireland

Base n = 400

Will cost of international travel increase, decrease, stay the same

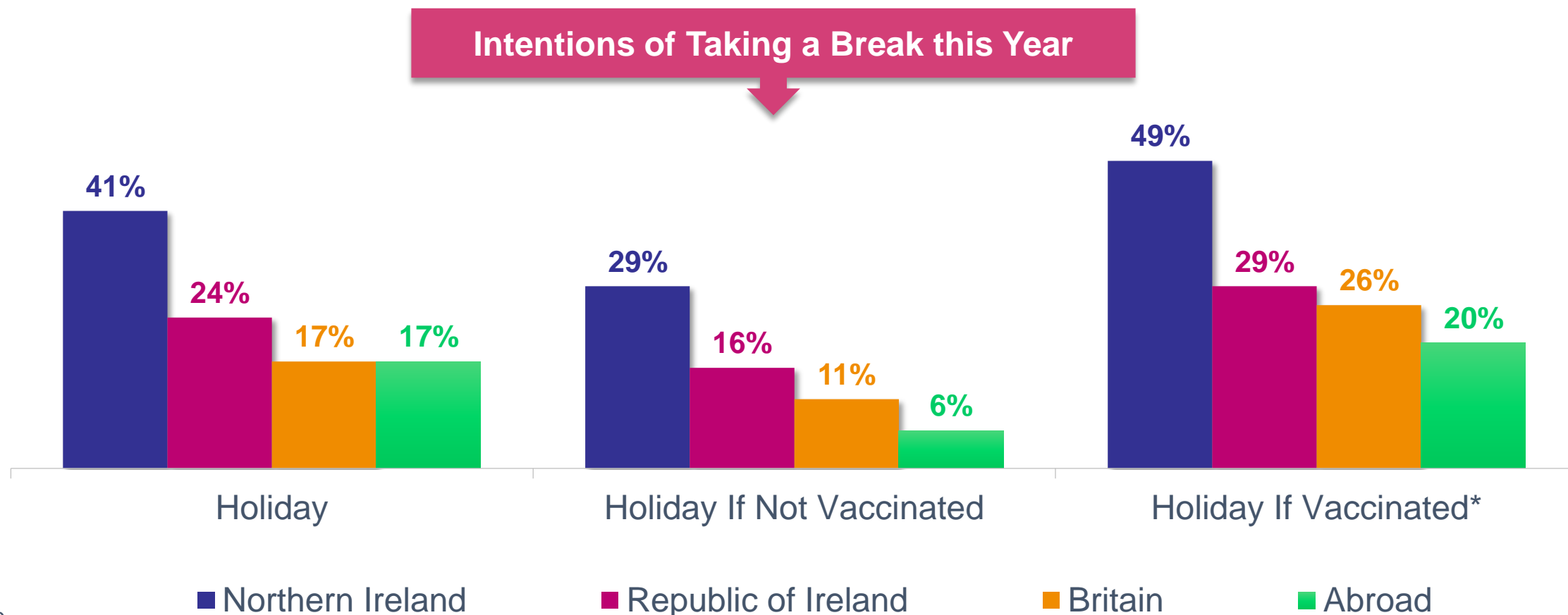


Q33. Post Covid, do you expect the cost of international travel will increase, decrease or remain the same as it was before Covid?

Travel Intent



The vaccine roll out will have biggest impact on increasing the number of people taking NI breaks

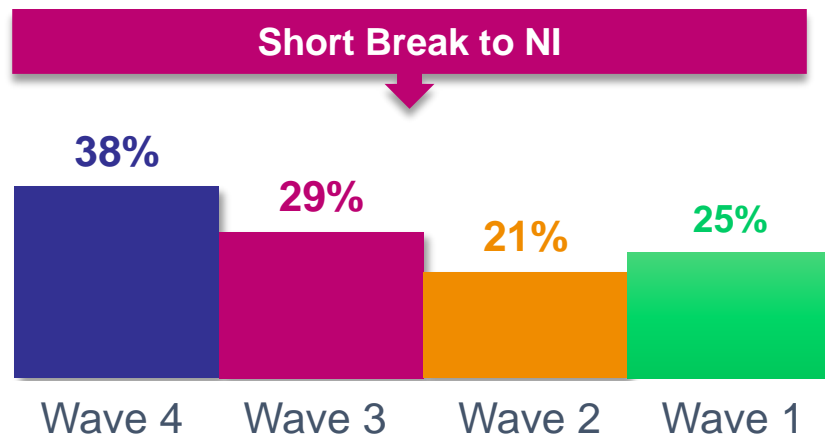


Base = 400

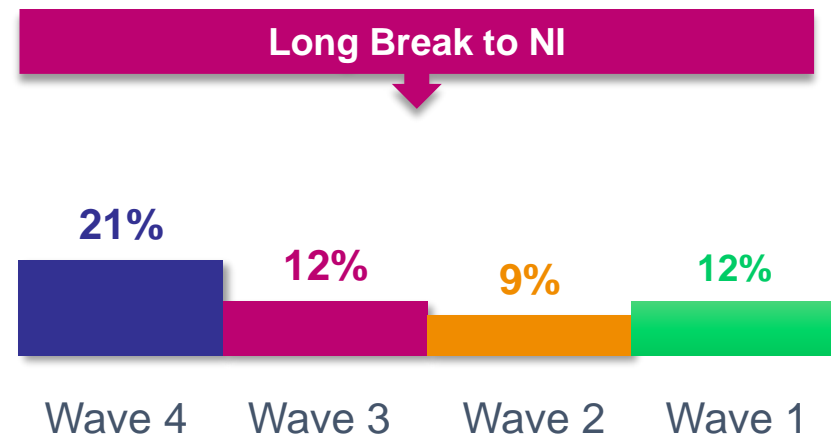
Strong Opportunity! Those intending on taking breaks in NI this year have increased significantly driven by a pent up demand by young/mid families

N = 400

Intention on taking a break to Northern Ireland this year



Intentions to take short breaks is highest amongst: 18-34 year olds (49%) & young/mid families (55%)



Intentions to take long breaks is highest amongst: 18-34 year olds (30%) & young/mid families (38%)

While most have not fully booked their short breaks – majority are planning to take it from July onwards



N = 400

38% intend to take a short break in Northern Ireland
 W3: 29% W2: 21% W1: 25%

How much of your short trip have you planned?

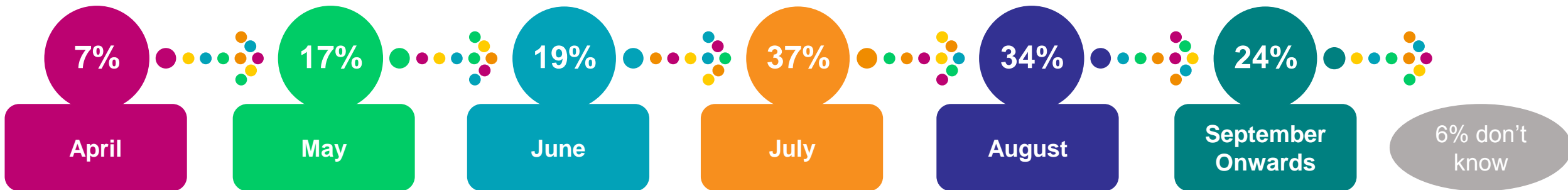
N = 151



Wave 3 figures:	18%	23%	59%
Wave 2 figures:	13%	14%	73%
Wave 1 figures:	19%	13%	68%

N = 151

*Intention to take a short break to Northern Ireland in:

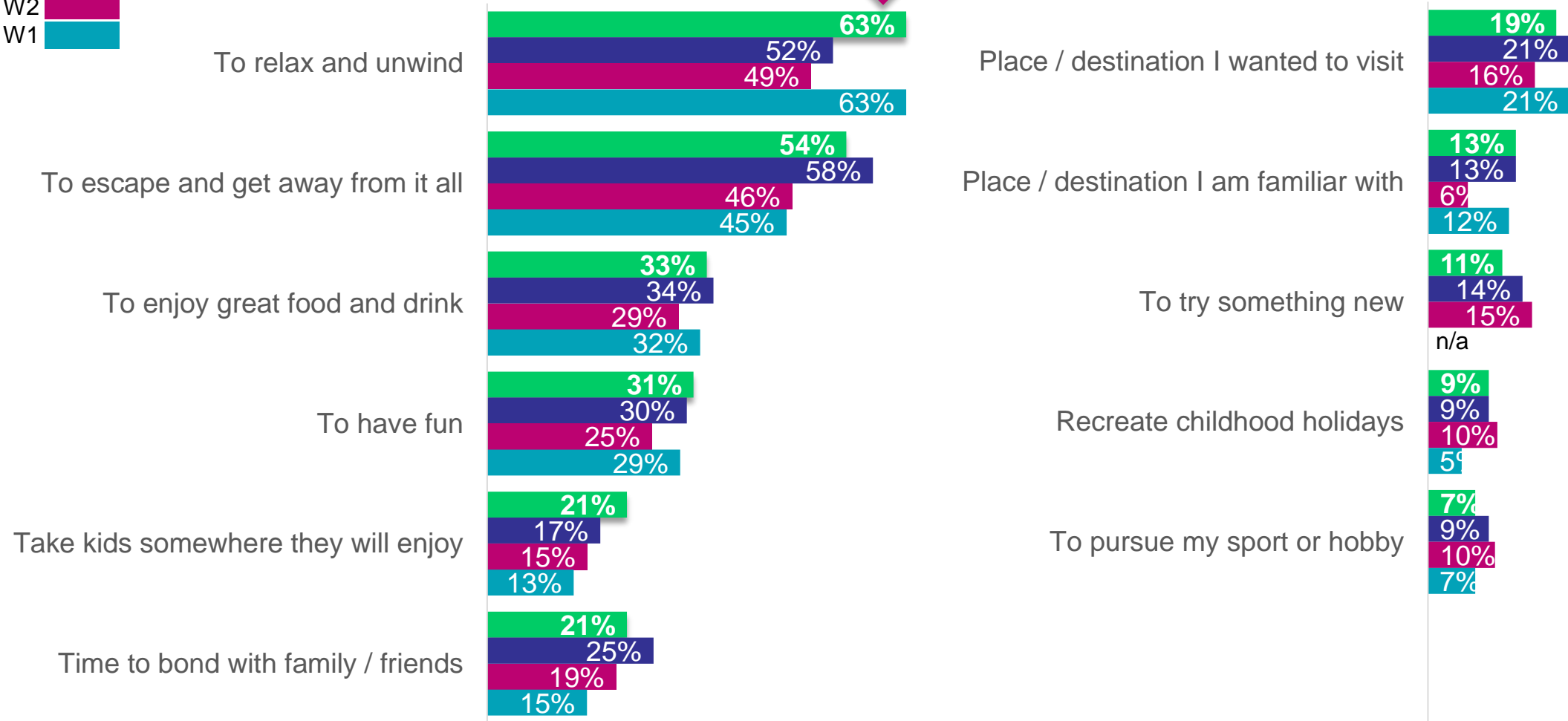


*Respondents could be intending on going on more than one trip

Tourists are increasingly seeing an NI break as an opportunity to relax and unwind – vital to dial this up in comms strategy

W4
W3
W2
W1

Motivations for longer / short breaks (combined)



Base = 163

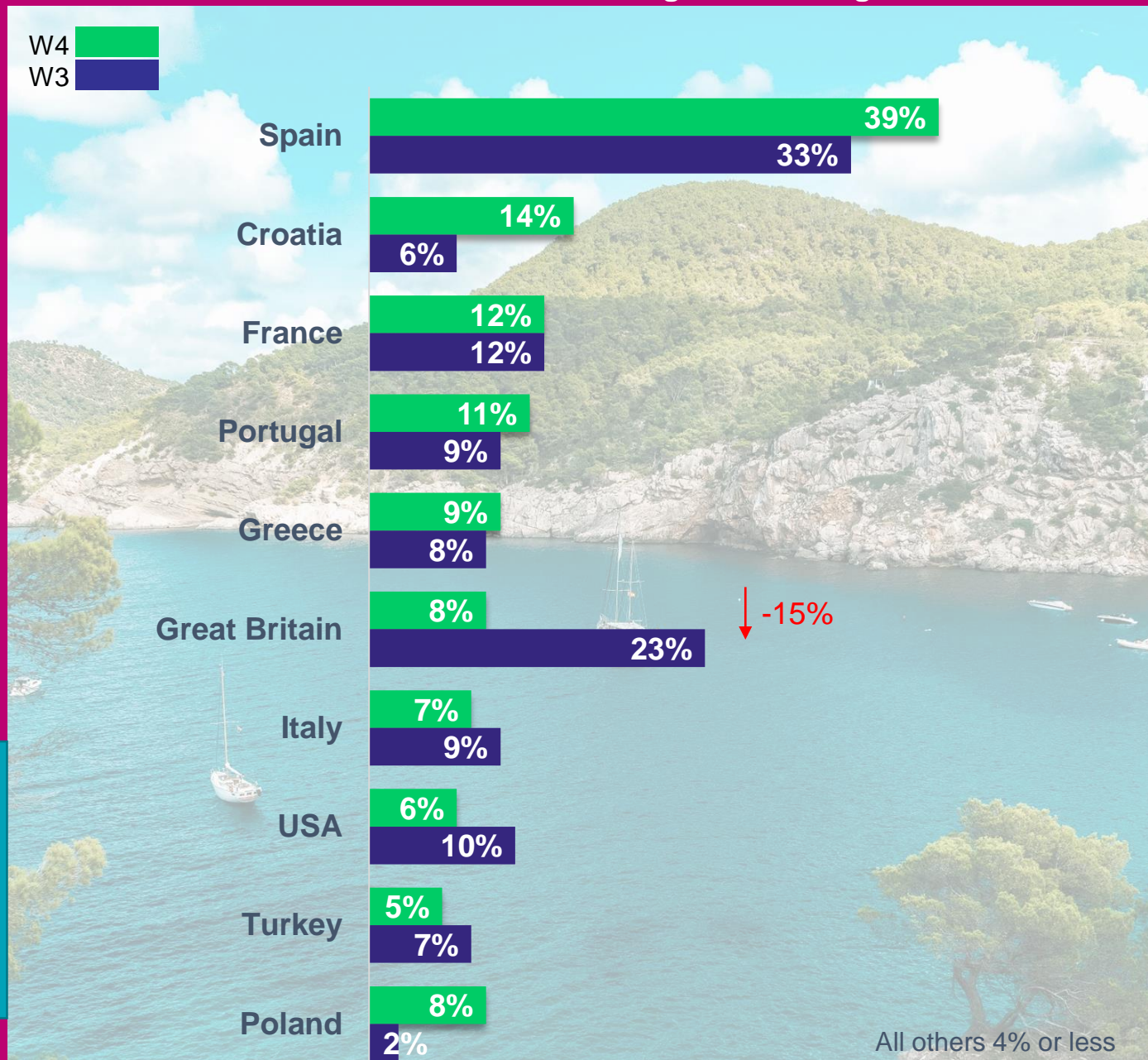
As we get closer to summer, sun holiday destinations are increasing in popularity
However, most hesitant to book

While demand for breaks in Britain has fallen

Of those intending to travel abroad this year
3 in 10 have booked their trip

Base = 68 – Intending on travelling abroad

Destination abroad attending on travelling to

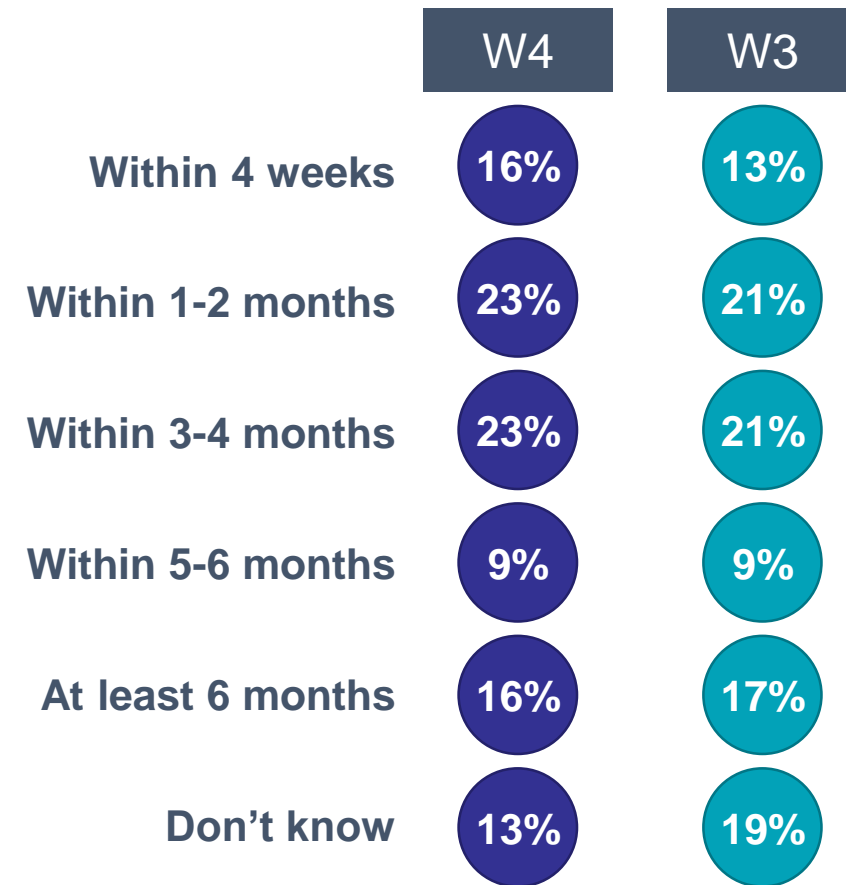
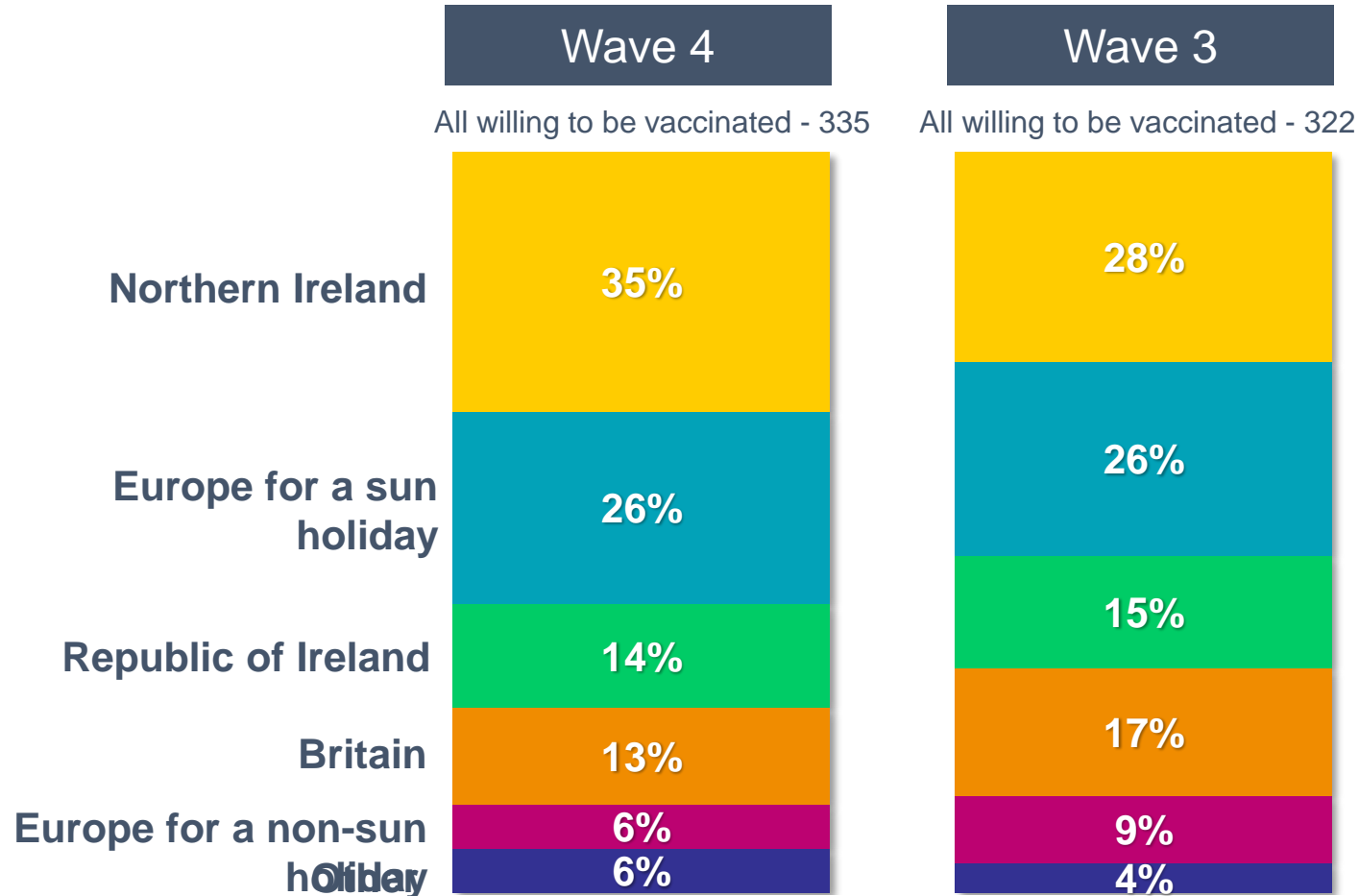


All others 4% or less

Encouraging to see more now likely to take a break in NI first – **Vital to make sure this pent up demand translates into breaks**

Once travel restrictions ease & vaccine received where are you likely to visit first?

How long after receiving the vaccine will you take this holiday?



Q22. If all the travel restrictions relating to the COVID-19 pandemic were eased and you have received the vaccine, which one of the following destinations are you likely to visit first for a short break or longer holiday?/ Q23. If travel restrictions were eased, how soon after receiving the vaccine are you likely to take this short break/ longer holiday?

Market Comparison

Travel Intent

Staycation* intent higher amongst ROI residents than NI residents

Intent: ROI Residents 57% VS NI Residents 41%

The top motivations for planned breaks in Northern Ireland consistent across both markets

ROI residents are more likely to intend on travelling abroad this year**

Intent: ROI Residents 24% VS NI Residents 17%

*holiday within your own country

**excluding island of Ireland & Britain

Attitudes Towards We're Good to Go

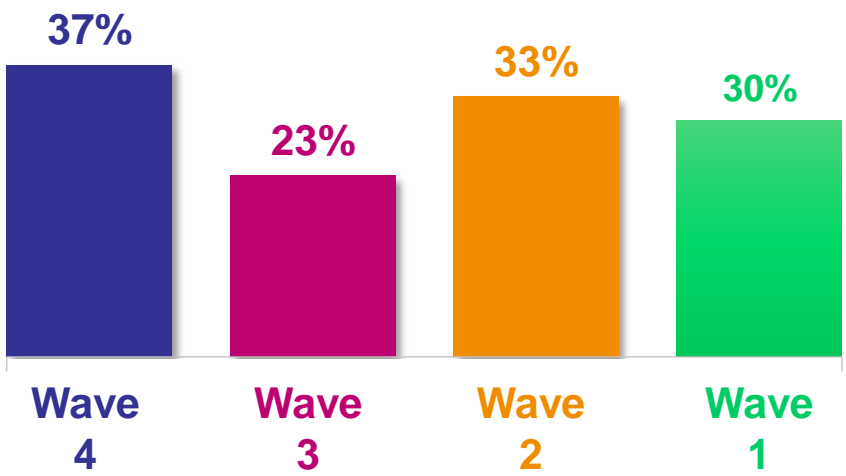




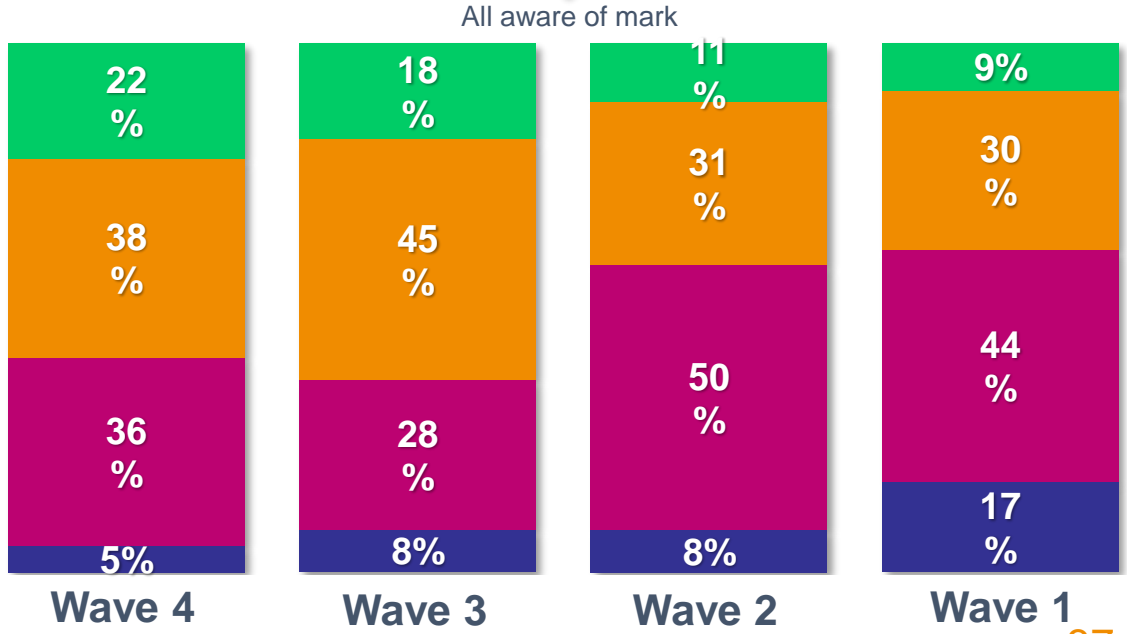
Awareness of WGTG mark has increased while providing 95% with at least a little confidence – important to raise awareness further to help encourage bookings

Awareness of Mark

Confidence the mark gives you that a business is safe



It gives me a lot of confidence
 It gives me confidence
 It gives me a little confidence
 It gives me no confidence



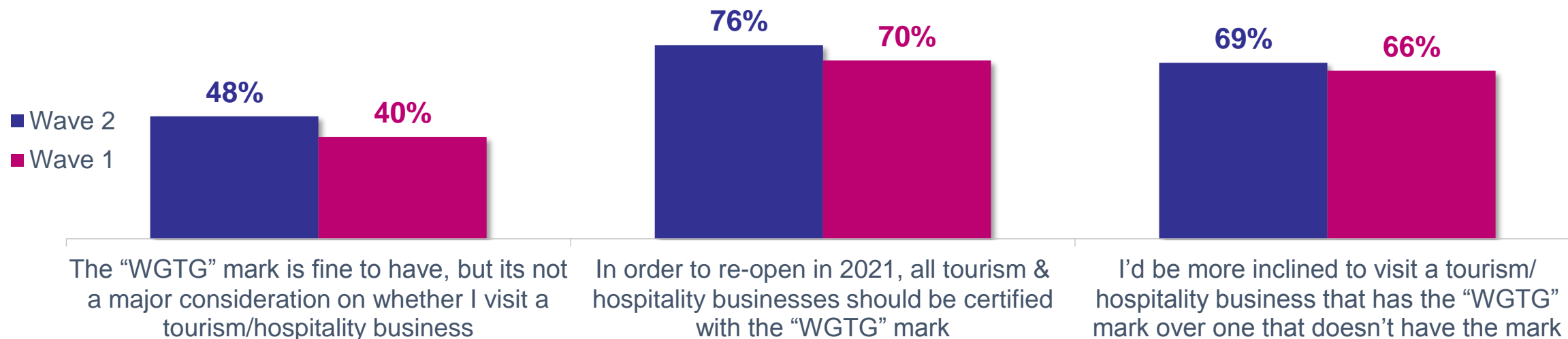
Base n = 400

Calls for all tourism businesses to have the mark before re-opening rising – important in reassuring tourists

An explainer of the “We’re Good to Go” mark was shown to respondents before answering this question

“We’re Good To Go” is the official UK mark to signal that a tourism and hospitality business has worked hard to follow Government and industry COVID-19 guidelines and has a process in place to maintain cleanliness and aid social distancing.

When restrictions ease....



Base n = 400

Q26. To what extent do you agree or disagree with the following statements in relation to the “We’re Good To Go” mark?

Future Gazing



The food & drink experience is what people are most looking in engaging in if on a break in NI

Base = 400

Most excited about engaging in if taking break in NI – Top 5



Restaurants/Cafes

25%



Pubs/Bars

17%



Walks/Hikes

10%



Spa/relaxation

8%



City sightseeing

6%

42%

Others of Interest:

Nature reserve/national park– 6%
Indoor Events– 5%

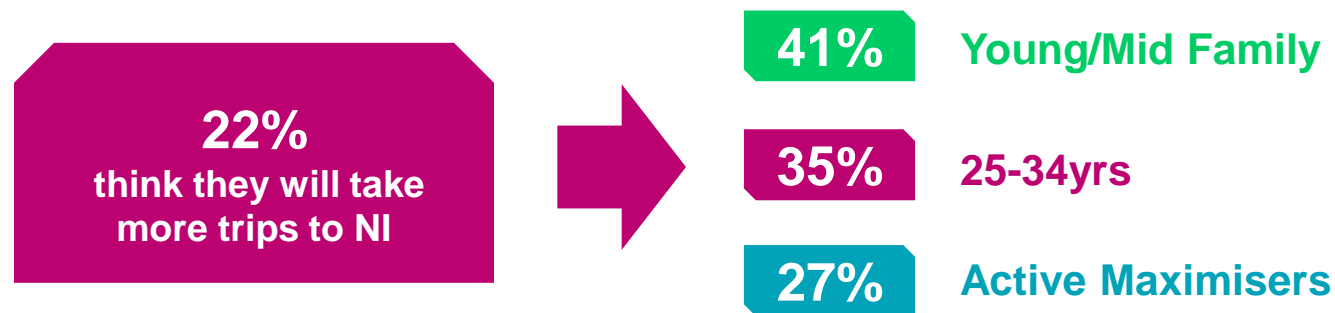
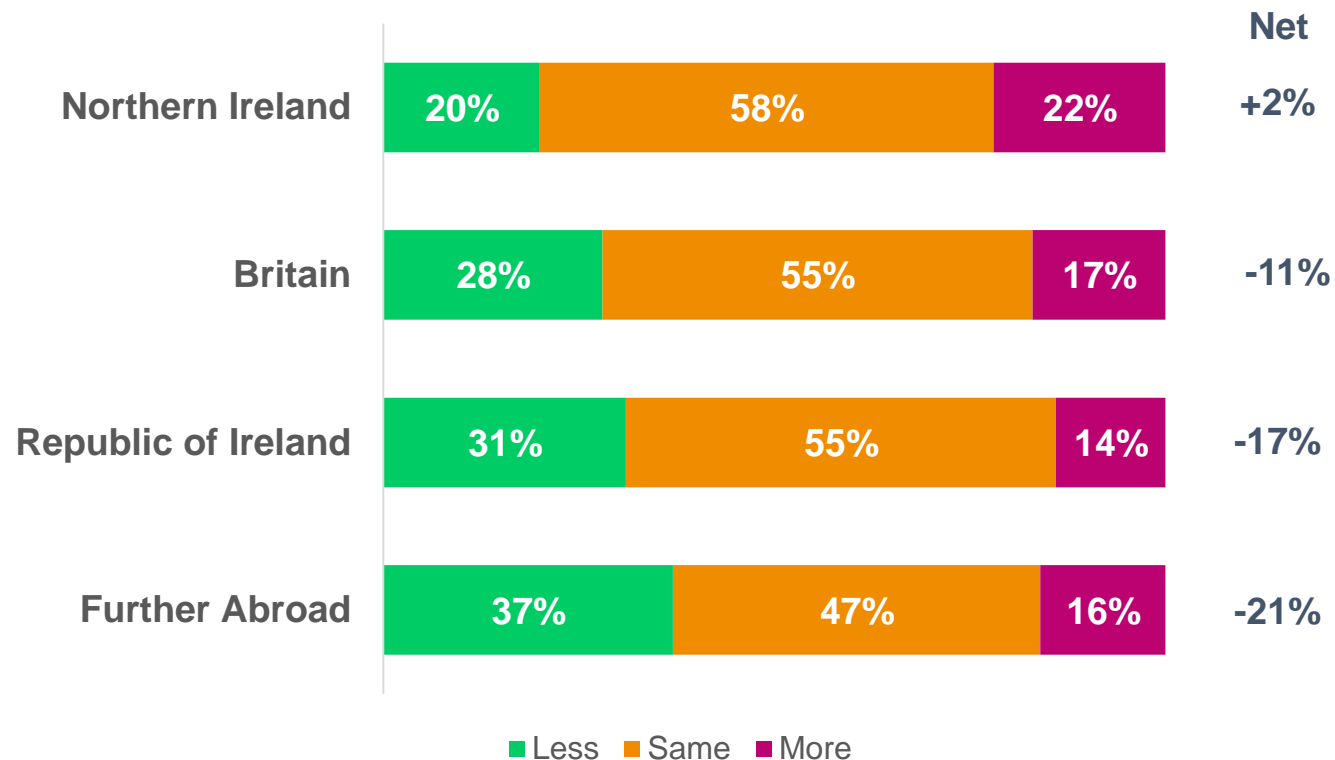
Q30. When restrictions are lifted and tourism activities are permitted, which of the following activities would you be most excited about /looking forward to engaging in if taking a short break in Northern Ireland? Please select one

There's no indication that travel in NI will lessen, however, the percentage of people travelling outside NI is likely to fall

May lead to a healthier domestic market in LT

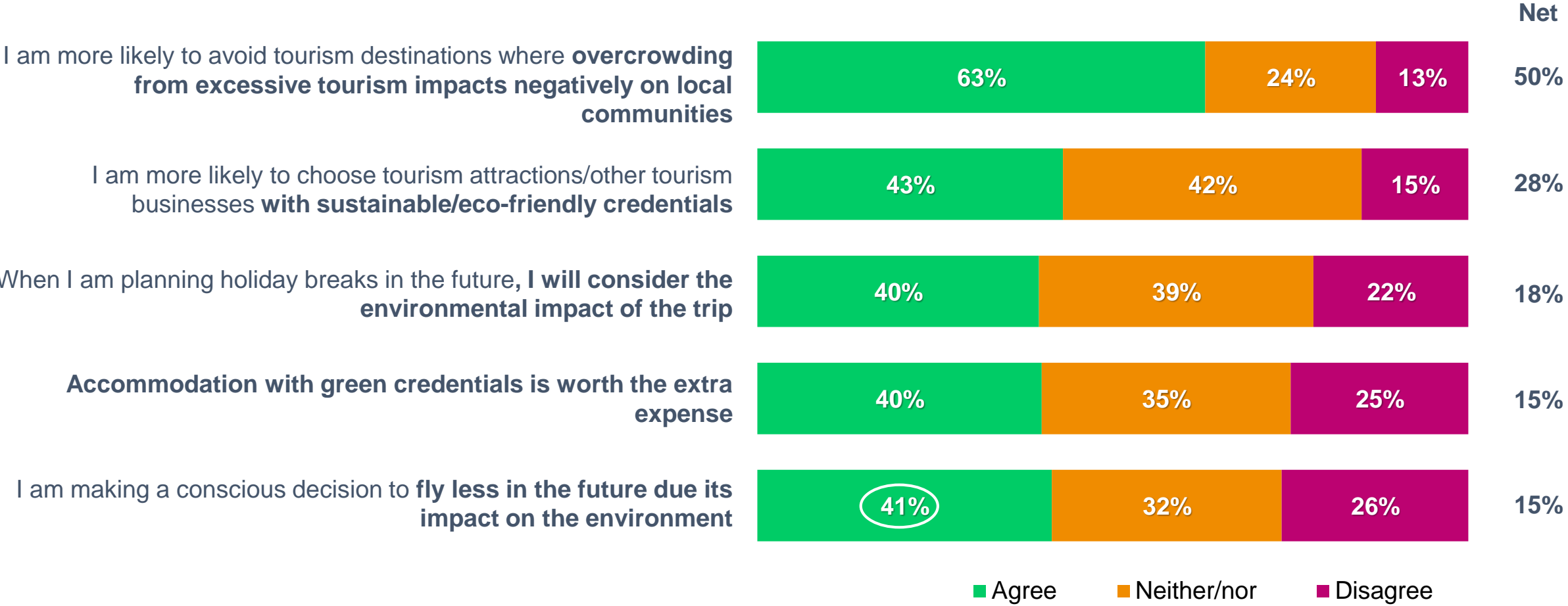
Base n = 400

Likelihood to take more, same or less trips Vs before Covid



Sustainability is a growing consideration for tourists – Domestic tourism likely to benefit from more making the decision to fly less

Future of tourism in a post covid world



Base n = 400

“Support Local” messaging will resonate with people as majority planning on supporting the tourism industry

Base n = 400

Conscious effort to support the tourism industry on the Island of Ireland



When things start to re-open and it is safe to travel.....

64%

will make a conscious effort to support the tourism sector on the Island of Ireland

Highest Amongst

79%

• Intending on staycationing

71%

• Young/Mid Families

70%

• 25-34 year-olds

Market Comparison

Future gazing

NI Residents more likely to take a conscious decision to fly less in the future

ROI Residents 29% VS NI Residents 41%

Post Covid, 29% of ROI residents are planning to travel abroad* more than they did pre-covid

This drops to 16% amongst NI residents

ROI residents are slightly more likely to support the domestic tourism sector than in NI

ROI Residents 69% VS NI Residents 64%

*excluding island of Ireland & Britain

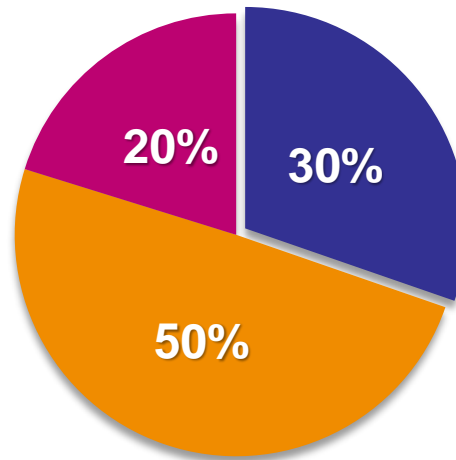
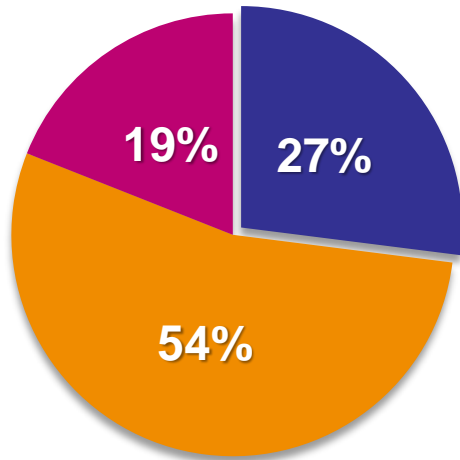
Events Deep Dive



Willingness to book **Outdoor** Event

Summer

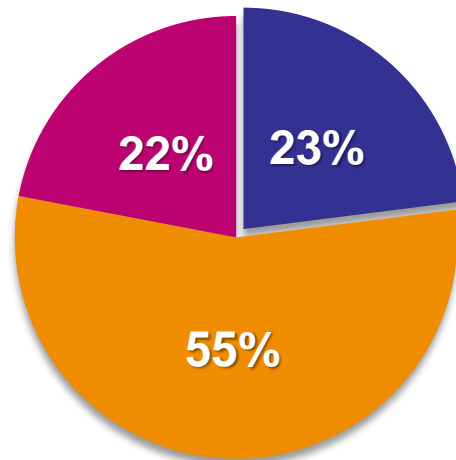
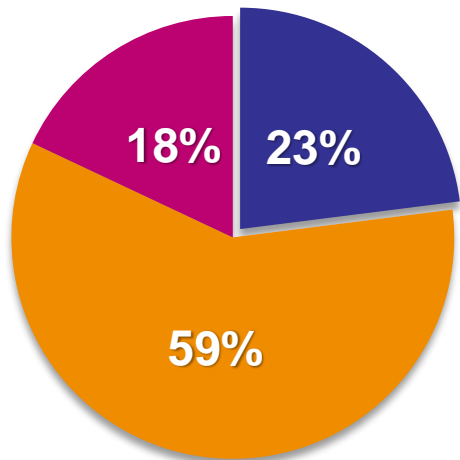
Autumn



Willingness to book **Indoor** Event

Summer

Autumn



Willingness to book only marginally higher for Autumn, while outdoor events considered safer

Need to convince the majority unwilling to book indoor or outdoor events

Base n = 400

Younger groups, males and aspiring families are most open to booking an outdoor event this summer

Potential for a targeted “Call to Action” to encourage this group to book

Base n = 400

Willingness to book outdoor event this summer

27%

Willing to book an outdoor event this summer



Who will be first to book

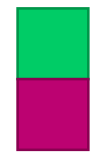
Males
32%

18-34 year olds
40%

Aspiring Families
37%

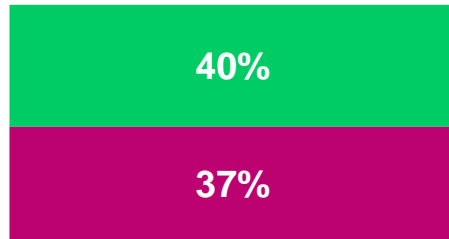
Social Instagrammers
34%

Perception of Safety this Summer - Outdoor Event

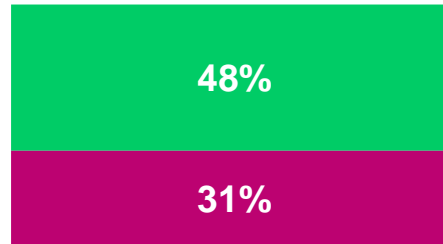


Safe
Unsafe

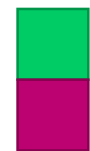
Large Outdoor Event



Small Outdoor Event

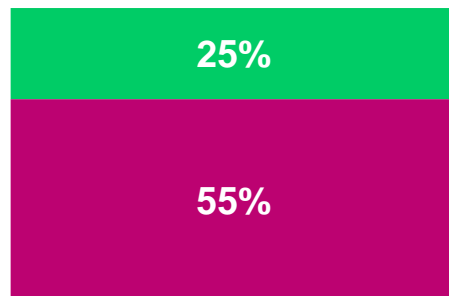


Perception of Safety this Summer - Indoor Event

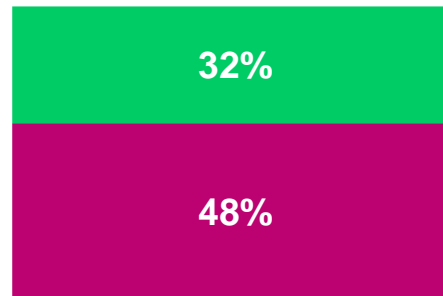


Safe
Unsafe

Large Indoor Event



Small Indoor Event



Small outdoor events are considered the safest option this summer

Most not ready for indoor events for the next few months

Main Concerns with Live Events:

- ✓ Contracting Covid
- ✓ Overcrowding
- ✓ Other people not adhering to safety rules
- ✓ Venues not having safe procedures in place

Base n = 400

Multiple safety procedures and precautions must be in place for people to feel safe attending an event

Over 2 in 5 calling for vaccination only attendees

Base n = 400

What would give reassurance that an event is safe to attend

