

# Consumer Sentiment ROI Market April 2021



tourism  
northernireland



# 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 23<sup>rd</sup> Mar – 6<sup>th</sup> Apr

Case numbers  
steady



AstraZeneca &  
blood clots



26<sup>th</sup> Mar

Health Minister says Beacon Hospital will continue vaccinations despite private school controversy

Leftover vaccines were given to staff from St Gerard's Catholic school in Bray this week.

29<sup>th</sup> Mar



3<sup>rd</sup> Apr

Teenagers aged 13 and 14 among eight arrests during rioting in loyalist area of south Belfast

There was also rioting in Derry with 27 officers injured across the two cities.

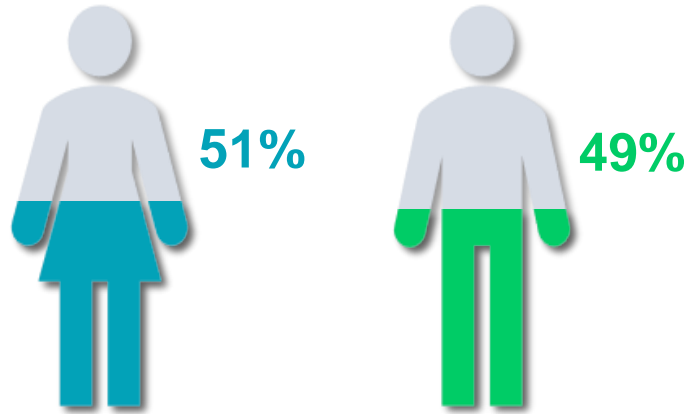
Apr 3rd 2021, 7:34 AM 76,054 Views 97 Comments

Share 34 Tweet Email

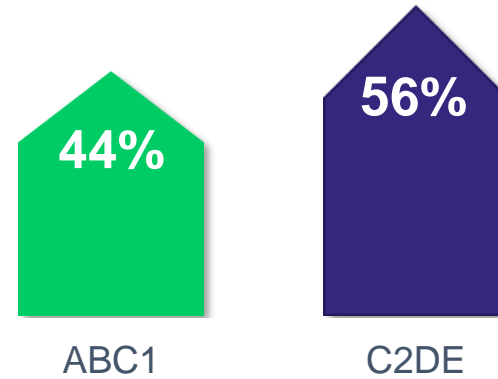
# We interviewed a robust, nationally representative sample in the Republic of Ireland

Total sample  
= 750

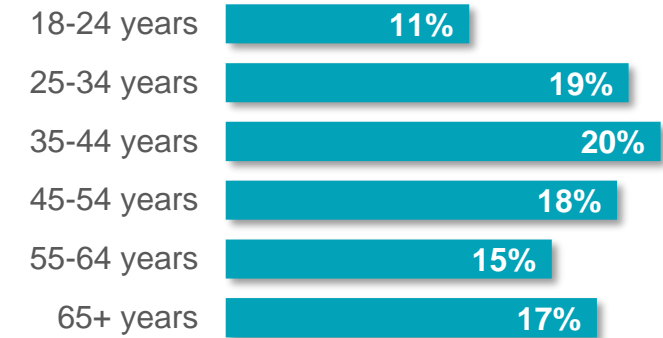
## Gender



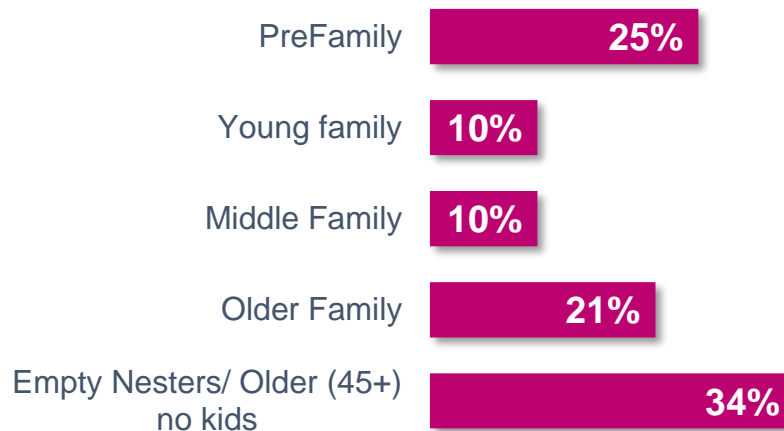
## Social Grade



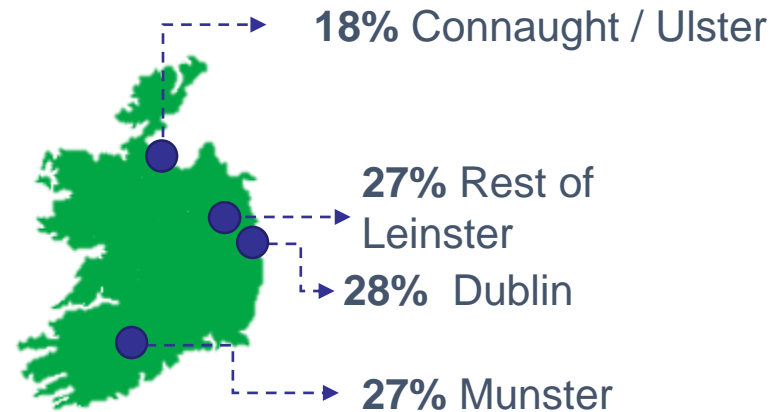
## Age



## Life-stage



## Region



Base n = 750

# Key takeaways

## Consumer sentiment continues to improve

- Only a minority now think the covid situation will get worse and willingness to be vaccinated has increased
- Anxiety levels have improved slightly – with fear of contracting covid, lockdown fatigue and general uncertainty being the biggest concerns
- As consumer sentiment improves, an increase in NI travel intent likely to follow

## More open to exploring NI breaks - not resulting in increased intentions yet

- Campaign should focus on providing hope, escapism & a way to de-stress
- Rising interest in international travel may impact travel intent to NI
- Important to hammer home messaging on value and ease of travel

## Sustainability will be more of a consideration post covid

- Sustainable considerations will have more of an influence on what type of holidays ROI residents choose post Covid
- Important for businesses to future proof their operations i.e. positive impact on local community/environment

## Amidst safety concerns, most not ready to book events

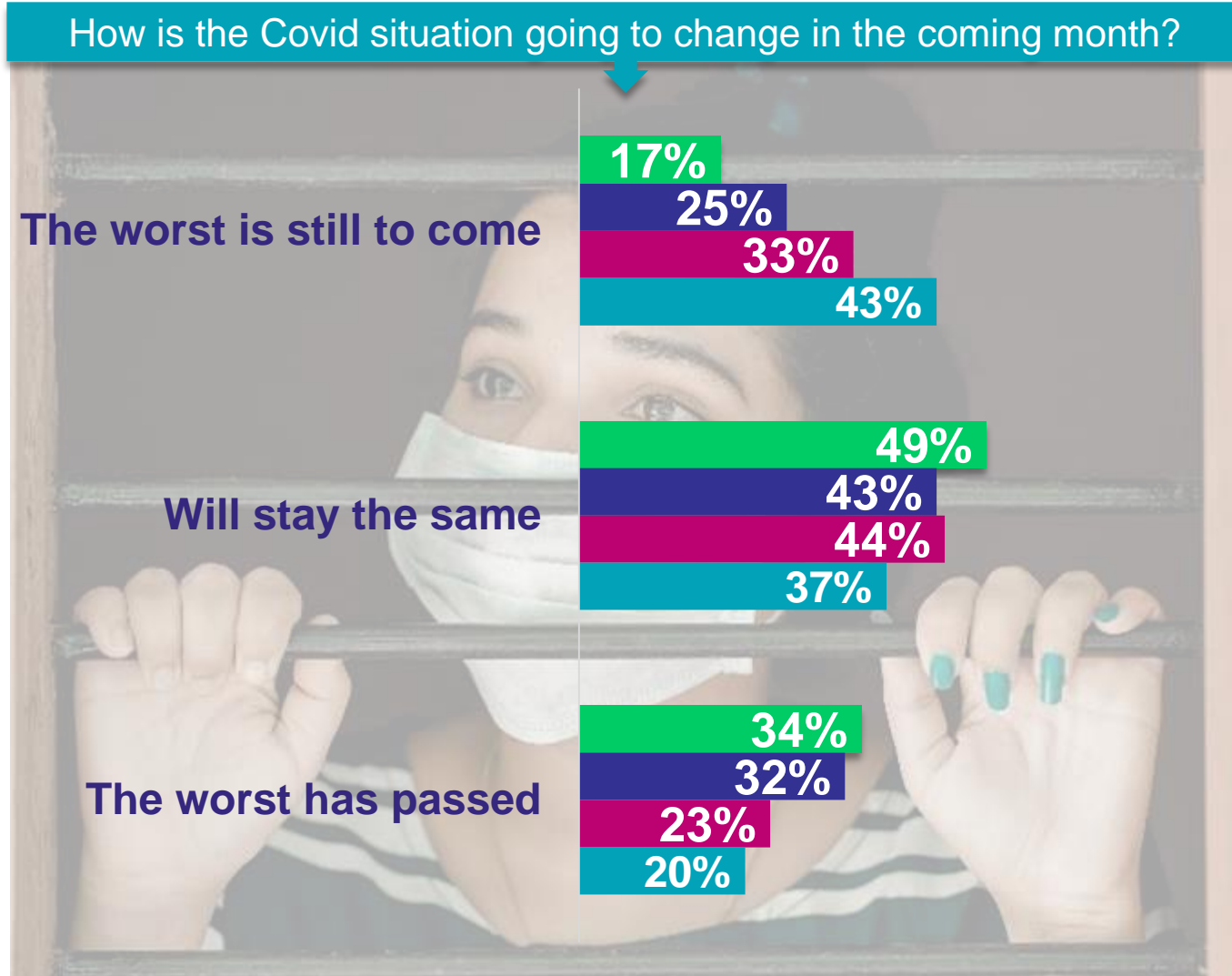
- Most potential in small outdoor events for this summer
- Almost half calling for vaccination only attendees
- Multiple safety procedures and precautions must be in place for people to feel safe attending an event

# Covid-19 and Tourism




# Pessimism is lessening, with males & older groups most positive

## Clear sense that we are over the worst of the Pandemic



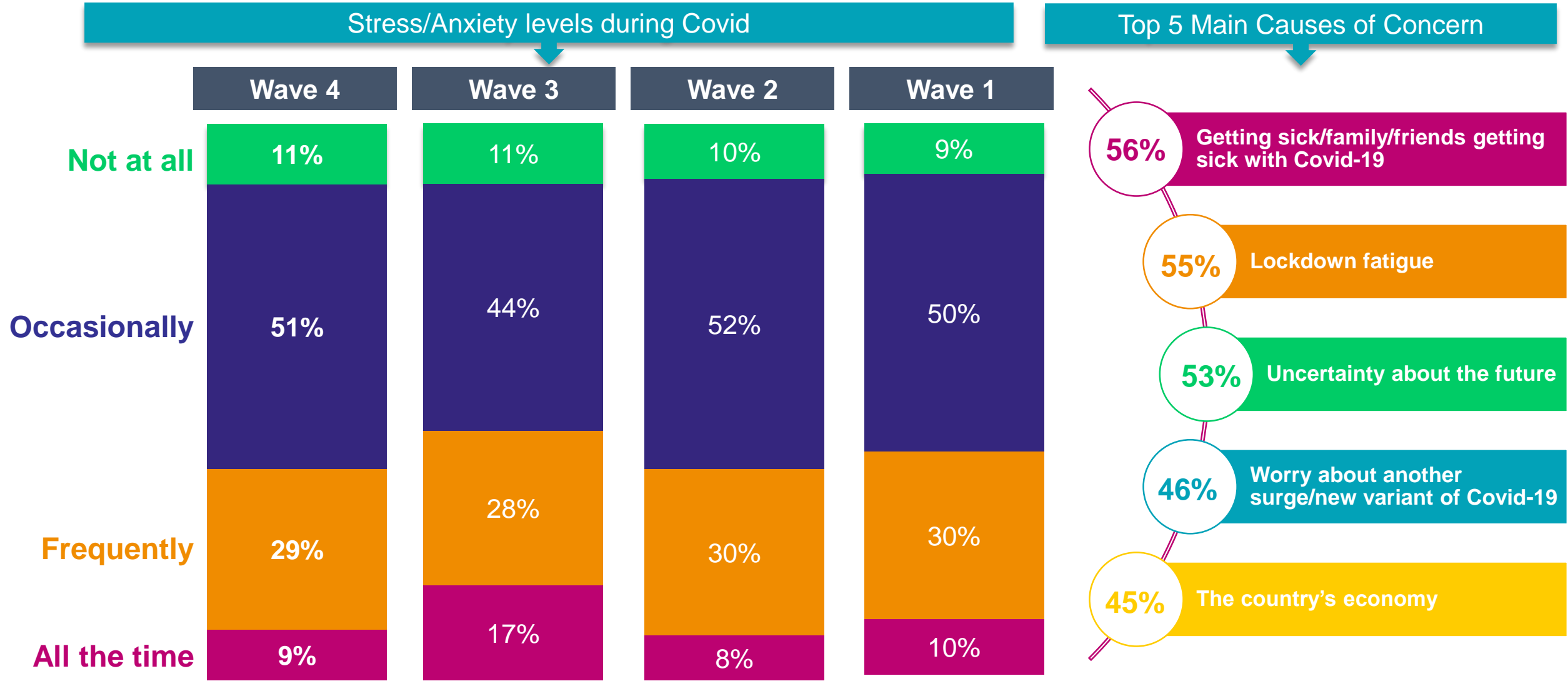
More negative outlook among young families (27%) 

More positive outlook among over 65s (45%), open minded explorers (43%) and males (41%) 

Base n = 750



# Anxiety levels now at pre Christmas levels (w2) – Campaign needs to reassure safety & offer hope for those with lockdown fatigue



Base n= 750

# Position holidays in NI as a safe stress release for mid-families & females - escapism will resonate with younger groups

## Groups with the highest levels of Anxiety

Those feeling concerned/anxious frequently or all the time



Mid Family



Females



Dublin



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



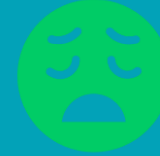
45-64 yrs



Females



Open-minded Explorers



Lockdown fatigue



35-54 yrs



Females



Mid Families



Uncertainty about the future



Pre-families



Active Maximisers



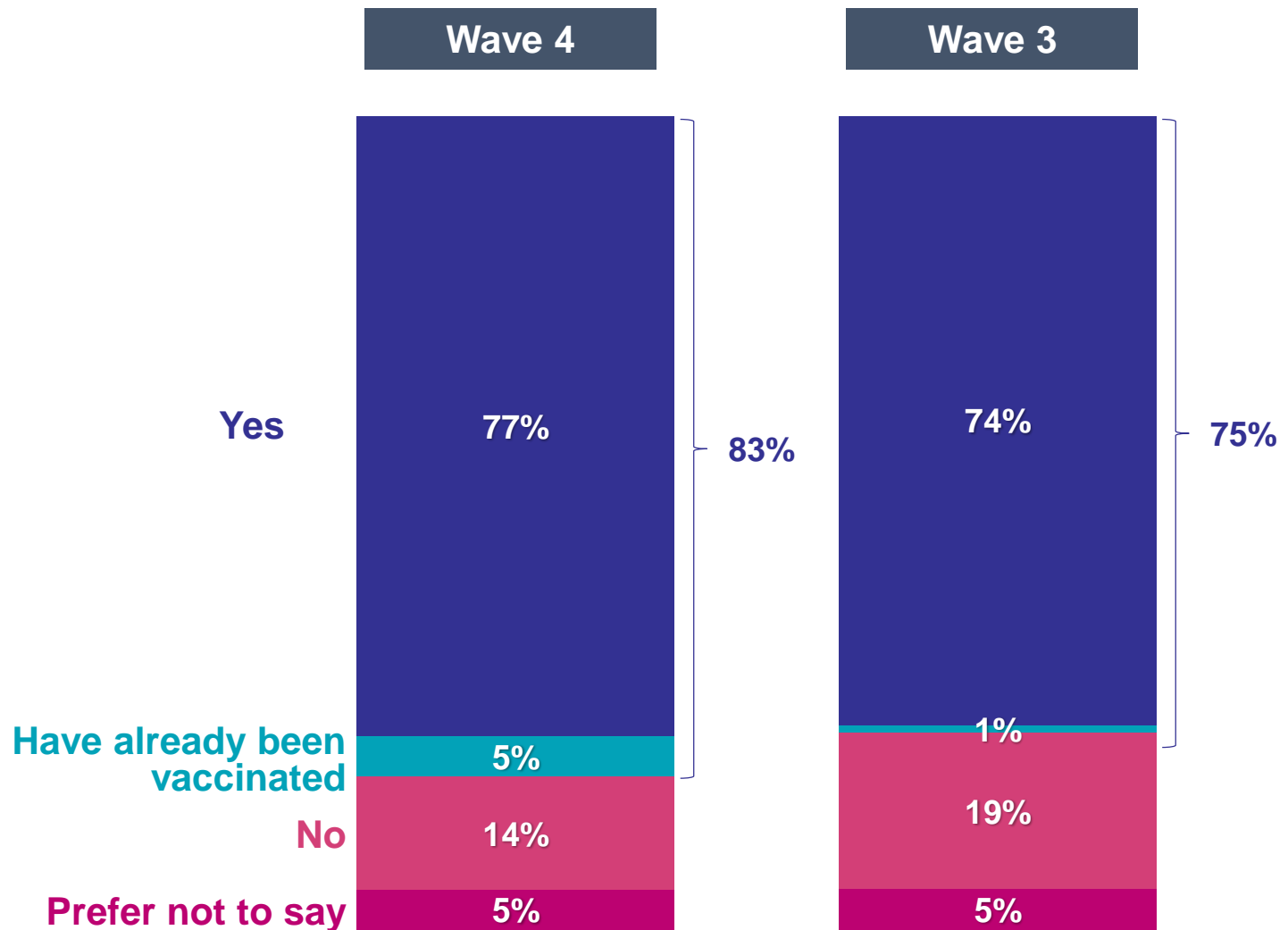
18-34 yrs

Base n= 750

As more people are getting vaccinated, willingness to receive the vaccine is rising

Vaccine is the best medicine to improving confidence

### Willingness to be vaccinated



Base n= 750

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%

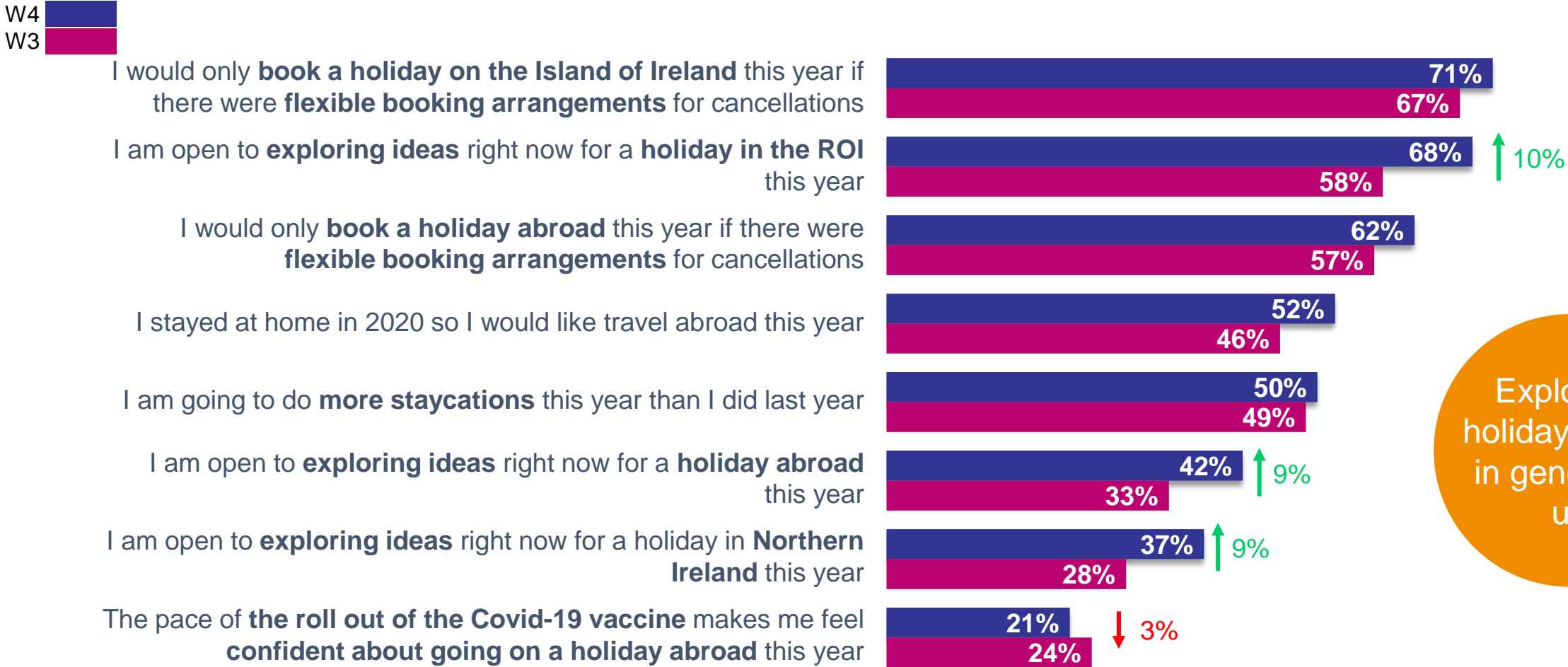
*\*willing to get vaccine/have already received vaccine*

# Current Attitudes towards Travel



# Interest in exploring holiday ideas is growing while faith that the vaccine rollout will mean travel abroad is feasible is dissipating

## Attitudes Towards Tourism – Agreement with Statement

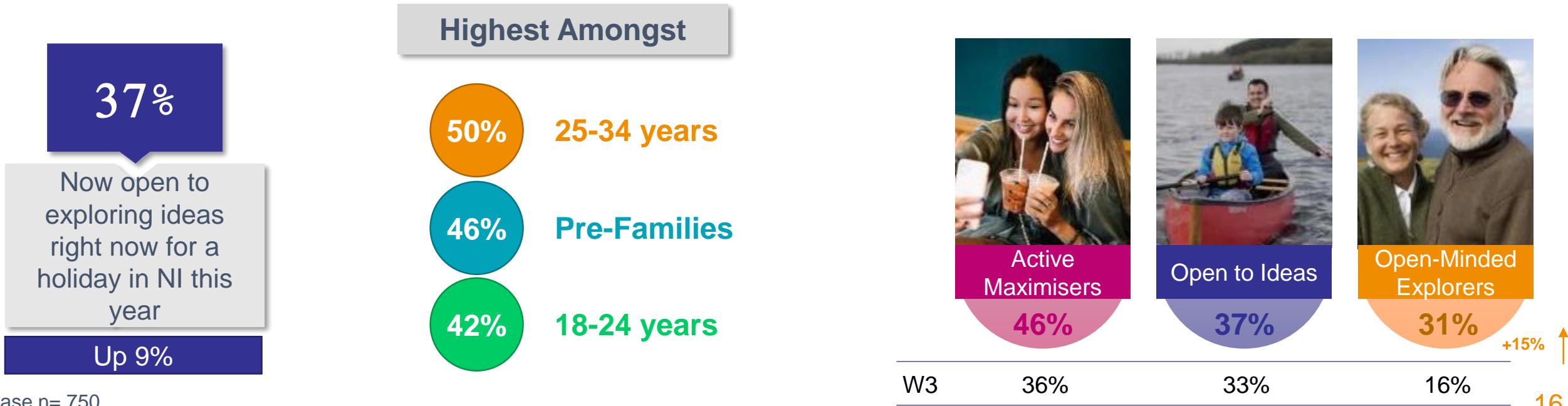


Exploring holidays ideas in general is up

Base n= 750

# Good News! Openness to exploring ideas for an NI holiday is growing, highest amongst younger groups however we have seen a big jump amongst Open-Minded Explorers – TNI need to tap into their openness

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



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 travel  
abroad this year

Wave 4

52%

Wave 3

46%

Highest Amongst

61%

• 18-24 year olds

60%

• Dublin

60%

• Empty Nesters

Lowest Amongst

55-64 years old – 43%

Conn/Ulster – 45%

Younger cohorts  
have the strongest  
desire to travel  
abroad – it might be  
more of a realistic  
opportunity for the  
older empty nesters

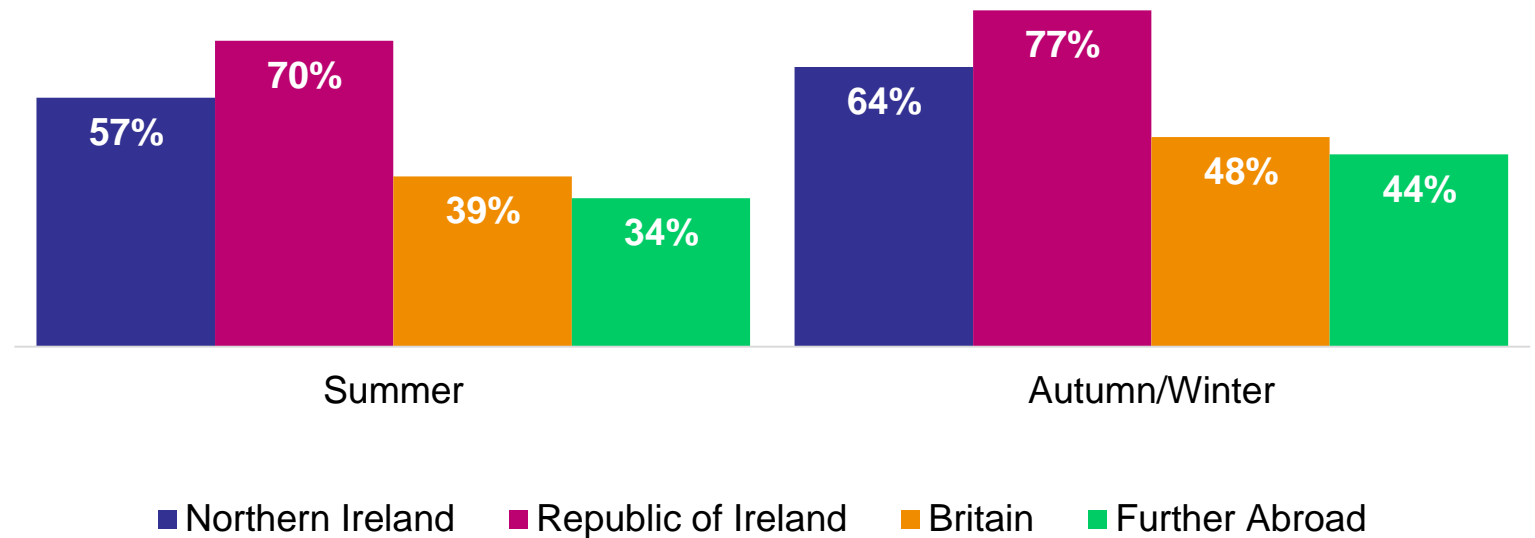
Efforts need to be  
made to ensure we  
don't lose these  
cohorts



While NI is not considered as safe as ROI – there isn't too large a difference



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



Q5. How safe do you think it would be to take a holiday or short break in each of the following locations during the summer months (i.e. May - September)? Q6. How safe do you think it would be to take a holiday or short break in each of the following locations during the autumn/winter months (October – December)?

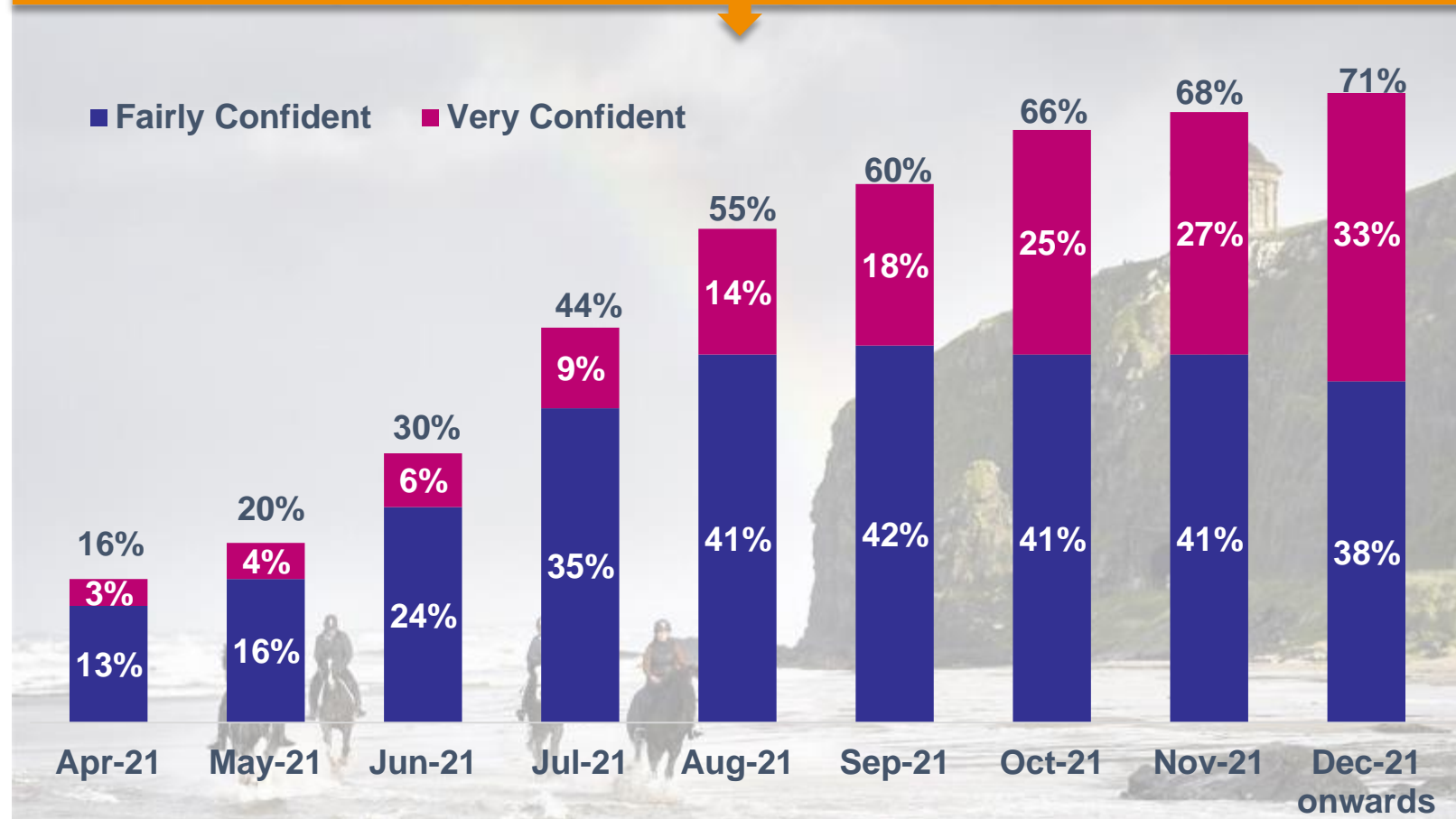
Base n= 750

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

From August onwards over half feeling confident that a holiday on the island could happen

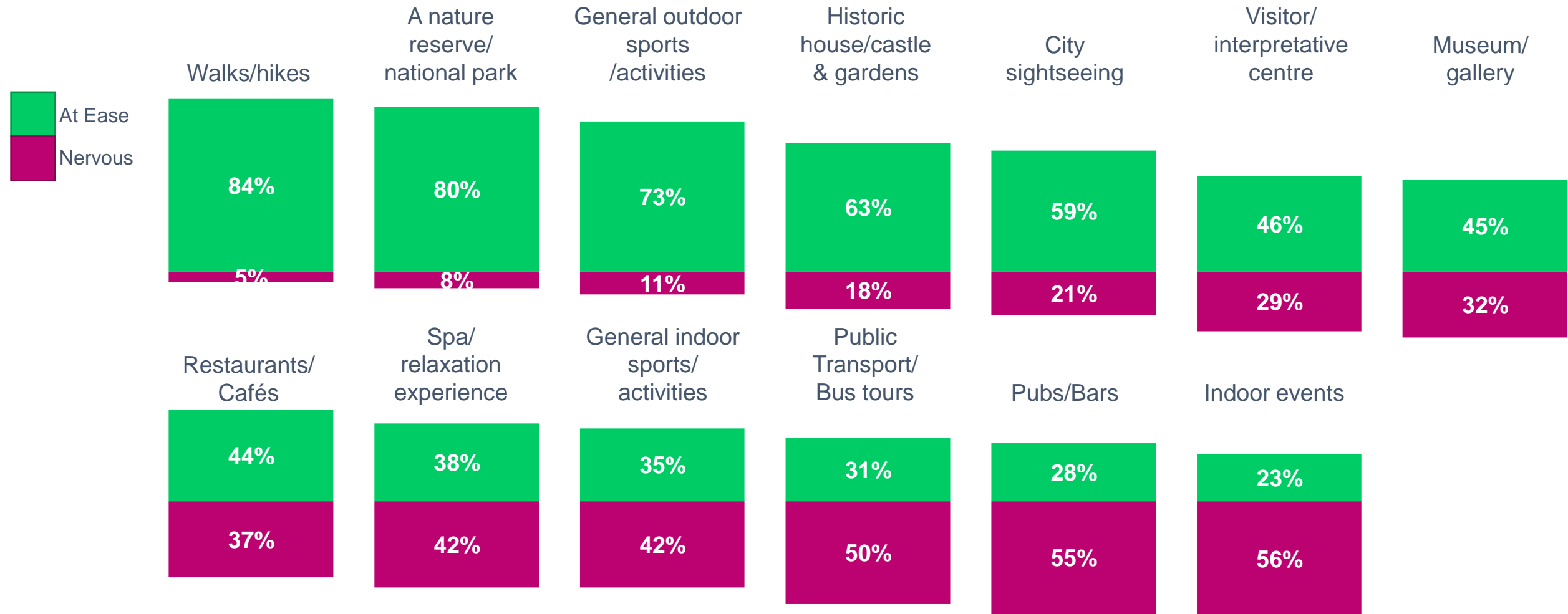
Highest amongst 18-24 year olds (66%) those living in Dublin (60%), young/ mid families (60%)

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



# Concern with crowded indoor activities will continue to be an issue this summer - **Outdoor is still the way to go**

## Ease in engaging with activities this summer





Base n= 750

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

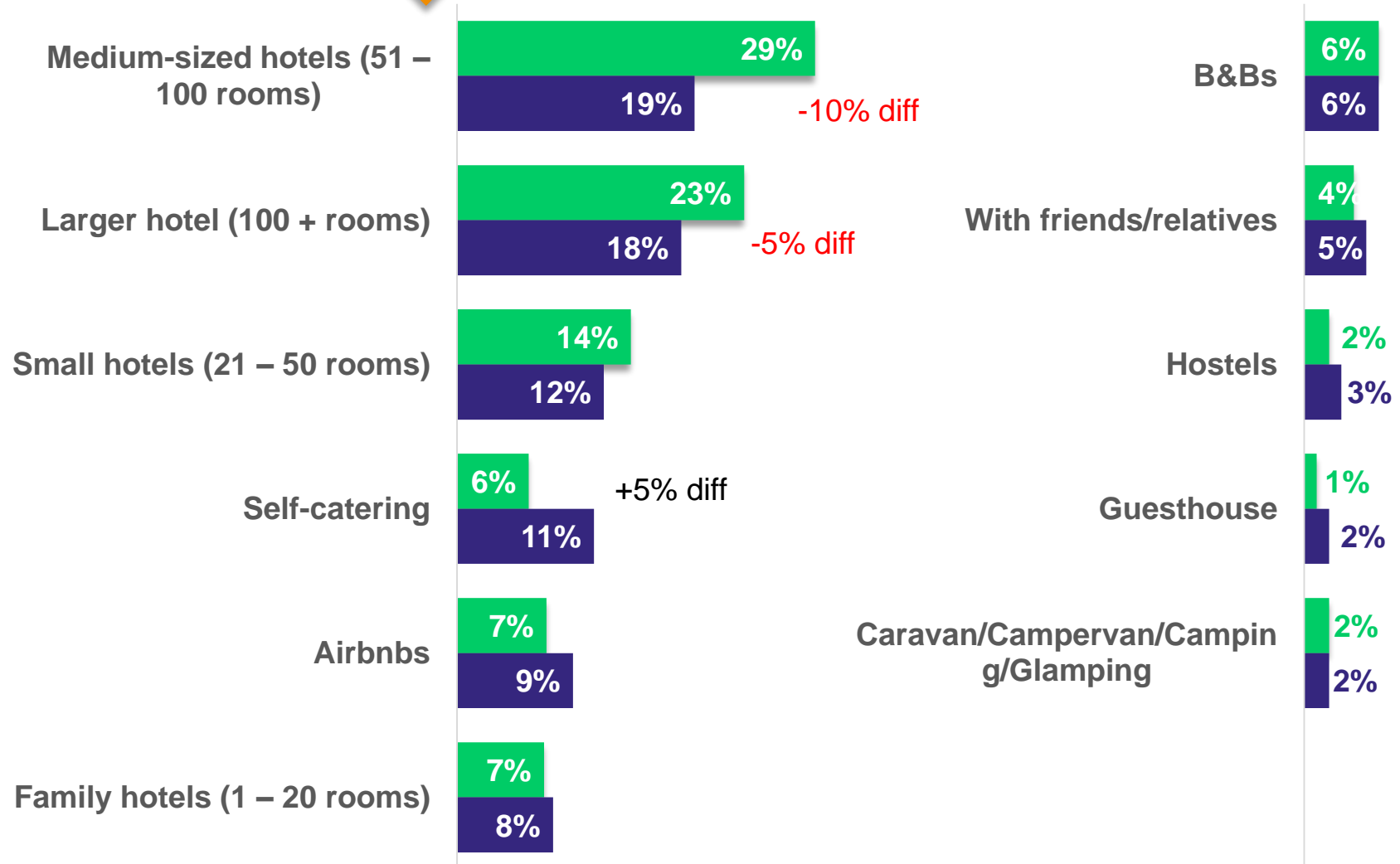
# Medium/larger hotels are most at risk of losing customers over safety concerns – Communicating safety credentials vital

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

 Normally stay in  
 Feel most safe



73% normally stay in hotels, while 57% would consider them the safest option



N = 750

Q9. Thinking more specifically about holiday accommodation, normally when taking short trips, what type of accommodation do you tend to stay in?

# 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



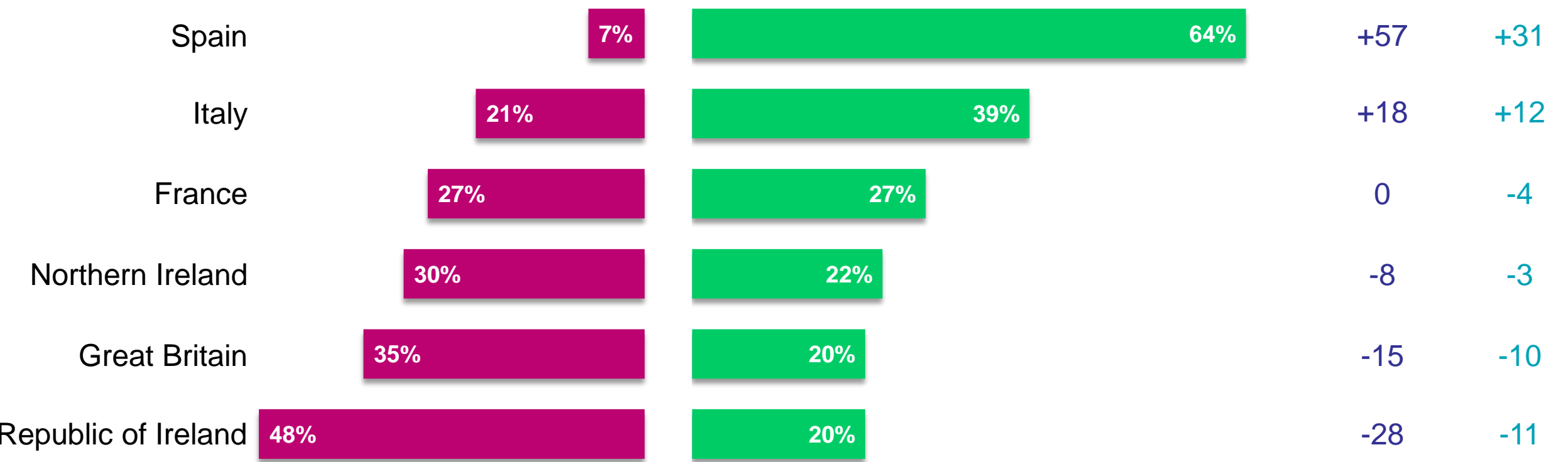
# Perception of value for money abroad has grown – TNI need to continue to highlight the value in NI with targeted comms



Poor Value for Money      Good Value for Money

Net Score

W4      W2



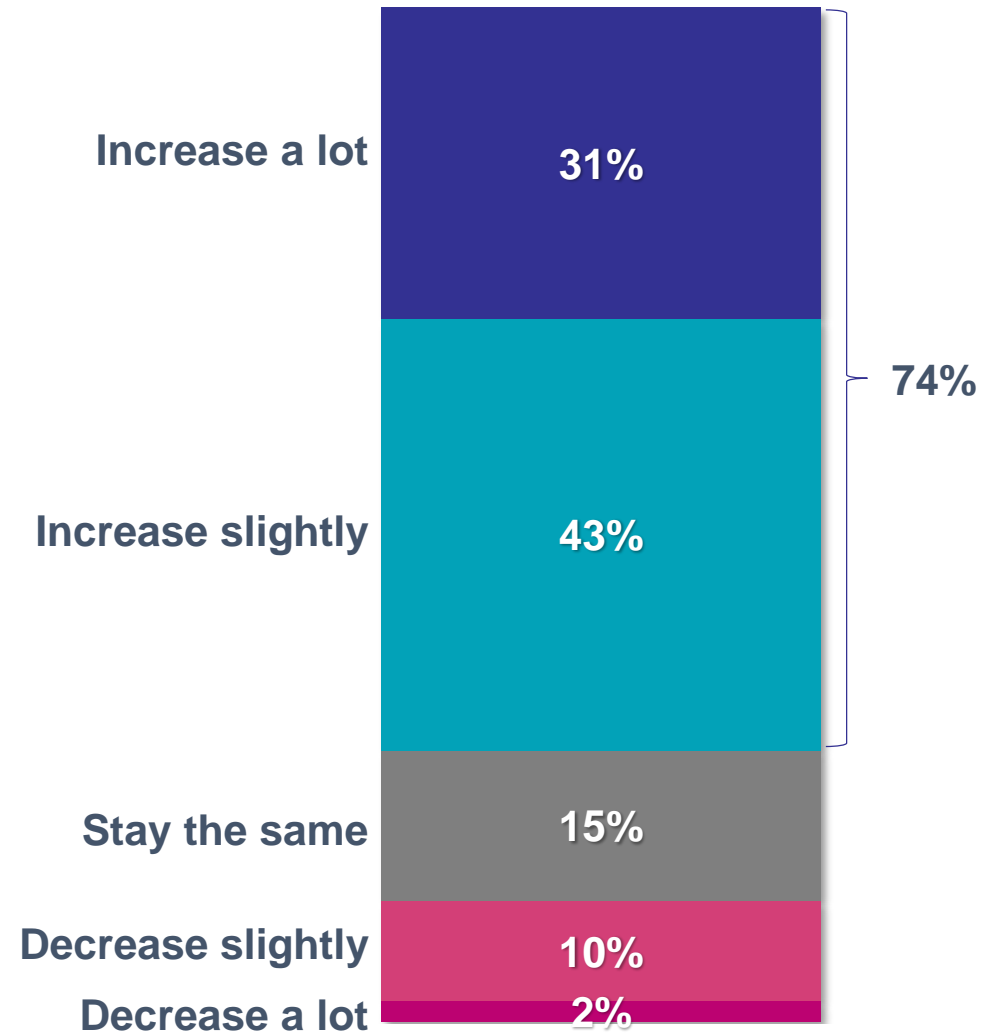
N = 750

Q13. When thinking of the following places as tourism destinations, to what extent does it offer value for money?

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

3 in 4 expecting the cost of international travel to increase

Opportunity for TNI to hammer home Northern Ireland's VFM credentials



Base n = 750



# Travel Intent



Of those who visited Northern Ireland since the pandemic began, more than half were visiting for the first time for Leisure purposes



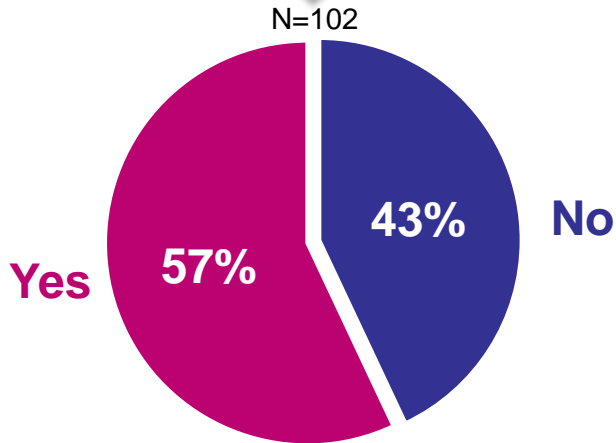
Top Reason for not visiting NI was Covid-19 safety concerns

Wave 3 & 4 Merged

Visited NI for the First Time

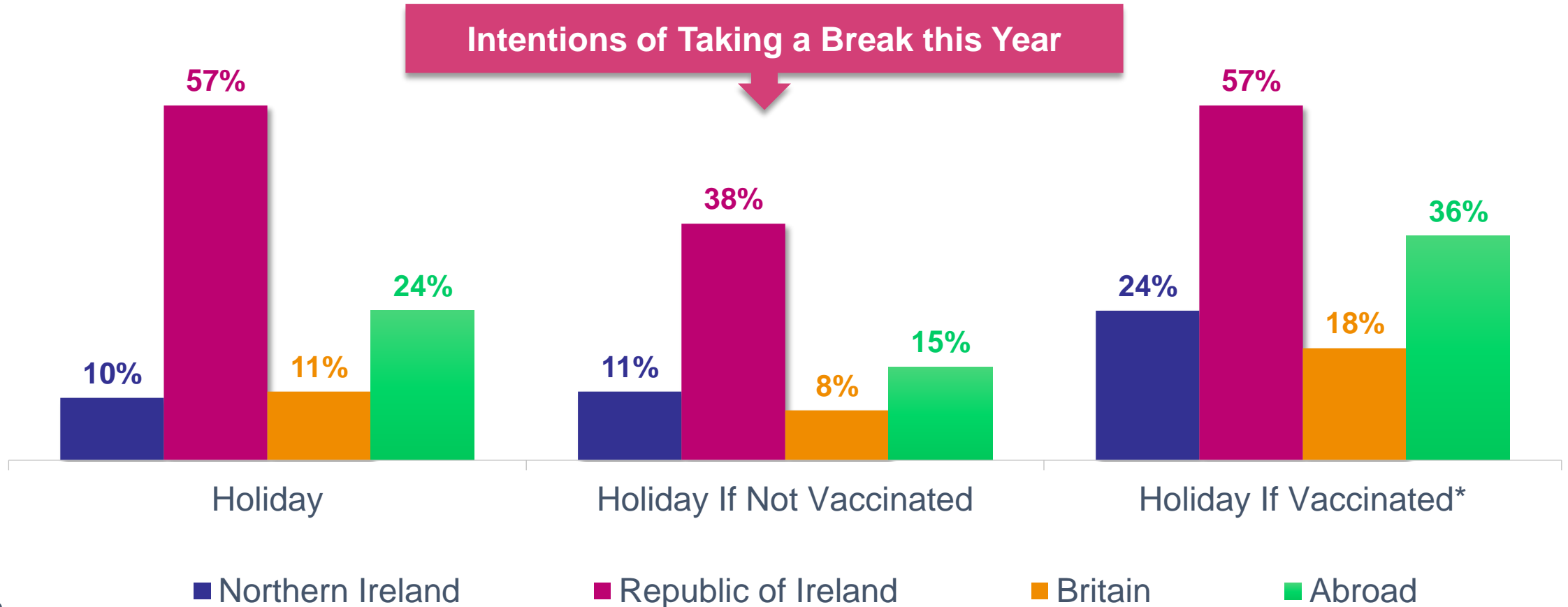
Words to Describe 1<sup>st</sup> impression

7%  
Visited Northern Ireland for Leisure purposes since April 2020



Base = 1,500

# Roll out of vaccines will result in an increase of ROI residents taking breaks in NI



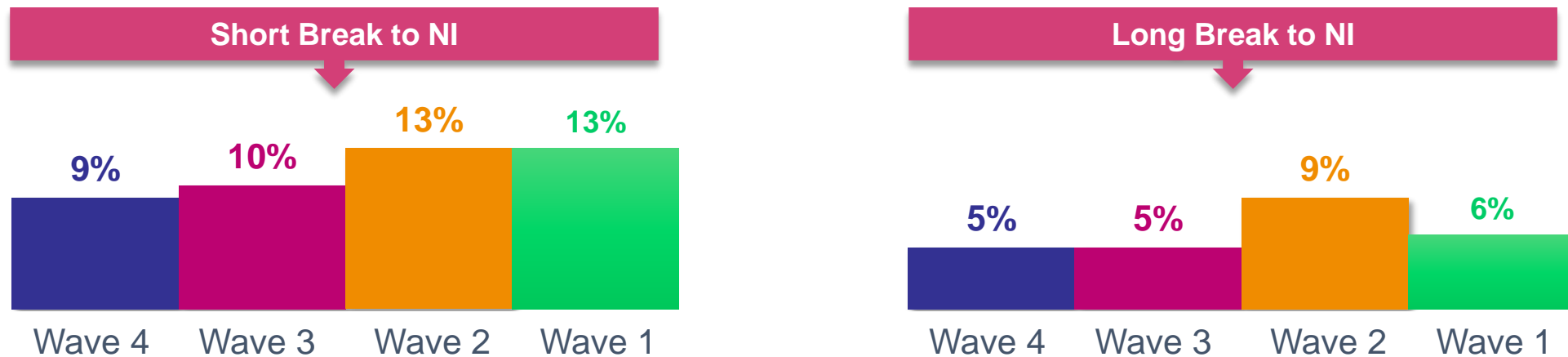
Base = 750

Intention to take a break in NI has remained relatively unchanged since the last wave

However, the uplift in consumer sentiment likely to result in an increase in intentions to travel to NI in the coming months

N = 750

### Intention on taking a break to Northern Ireland this year



Intentions to take a trip in NI is marginally higher amongst those living in Dublin (16%), Mid families (17%) and 45-54s (15%)

# Majority looking to take a short trip from July onwards

## Be ready for bookings to pick up from then

**Note:** Intention Q changed slightly vs previous waves – Intention to travel over the next “6 months” to “this year”



N =750

**9%** intend to take a short break in Northern Ireland  
W3: 10% W2: 13% W1: 13%

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

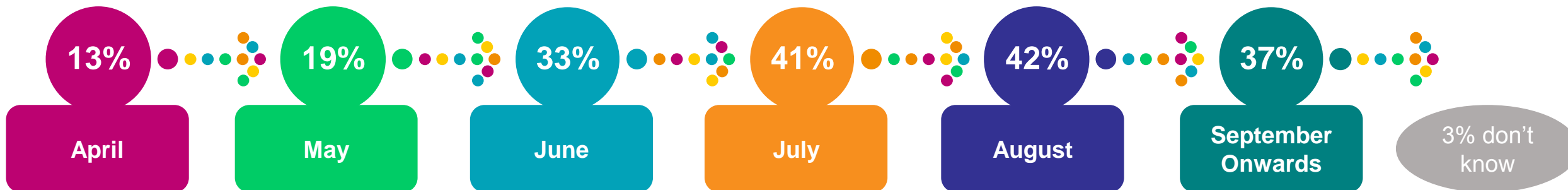
N =69



Wave 3 figures:	25%	31%	44%
Wave 2 figures:	35%	24%	40%
Wave 1 figures:	11%	23%	66%

N =69

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

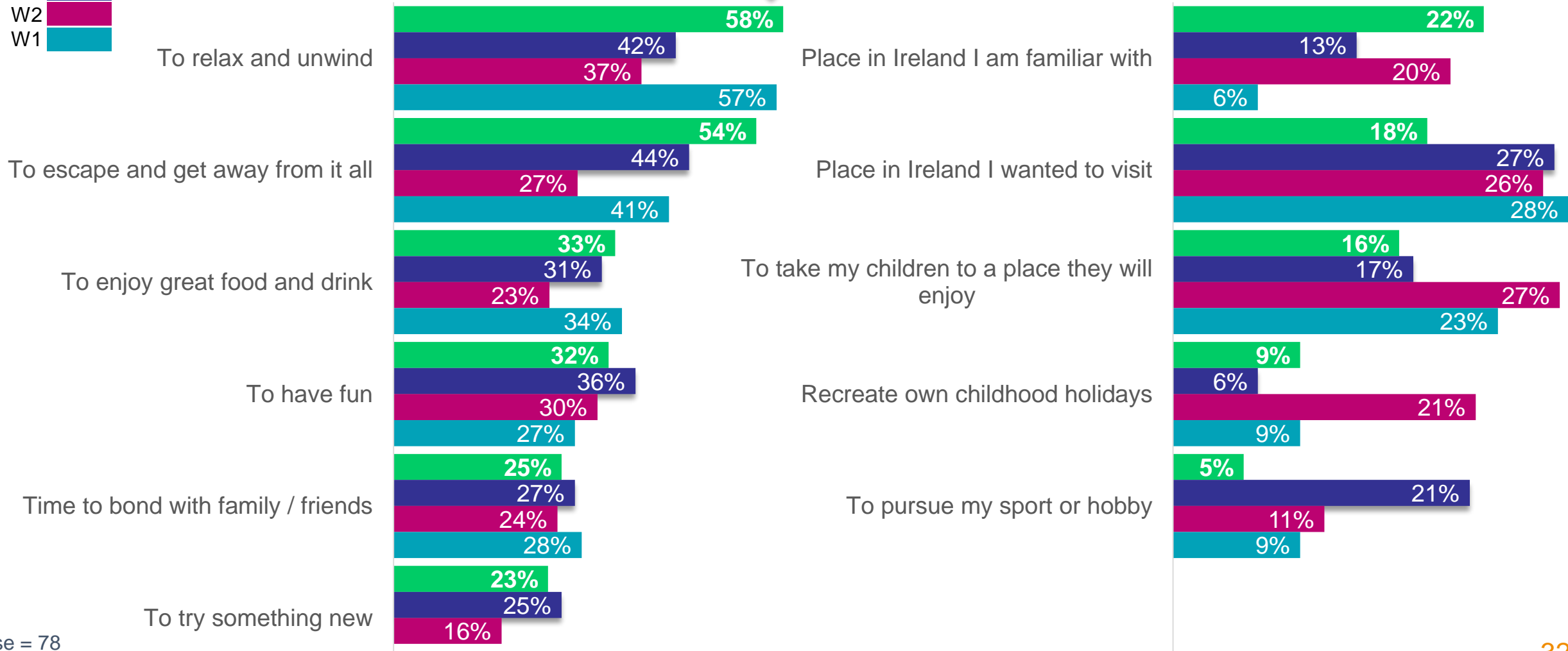


\*Respondents could be intending on going on more than one trip

# Lockdown fatigue contributing to a rise in people wanting to unwind and escape from it all – messaging will resonate strongly

W4  
W3  
W2  
W1

## Motivations for longer / short breaks (combined)



Base = 78

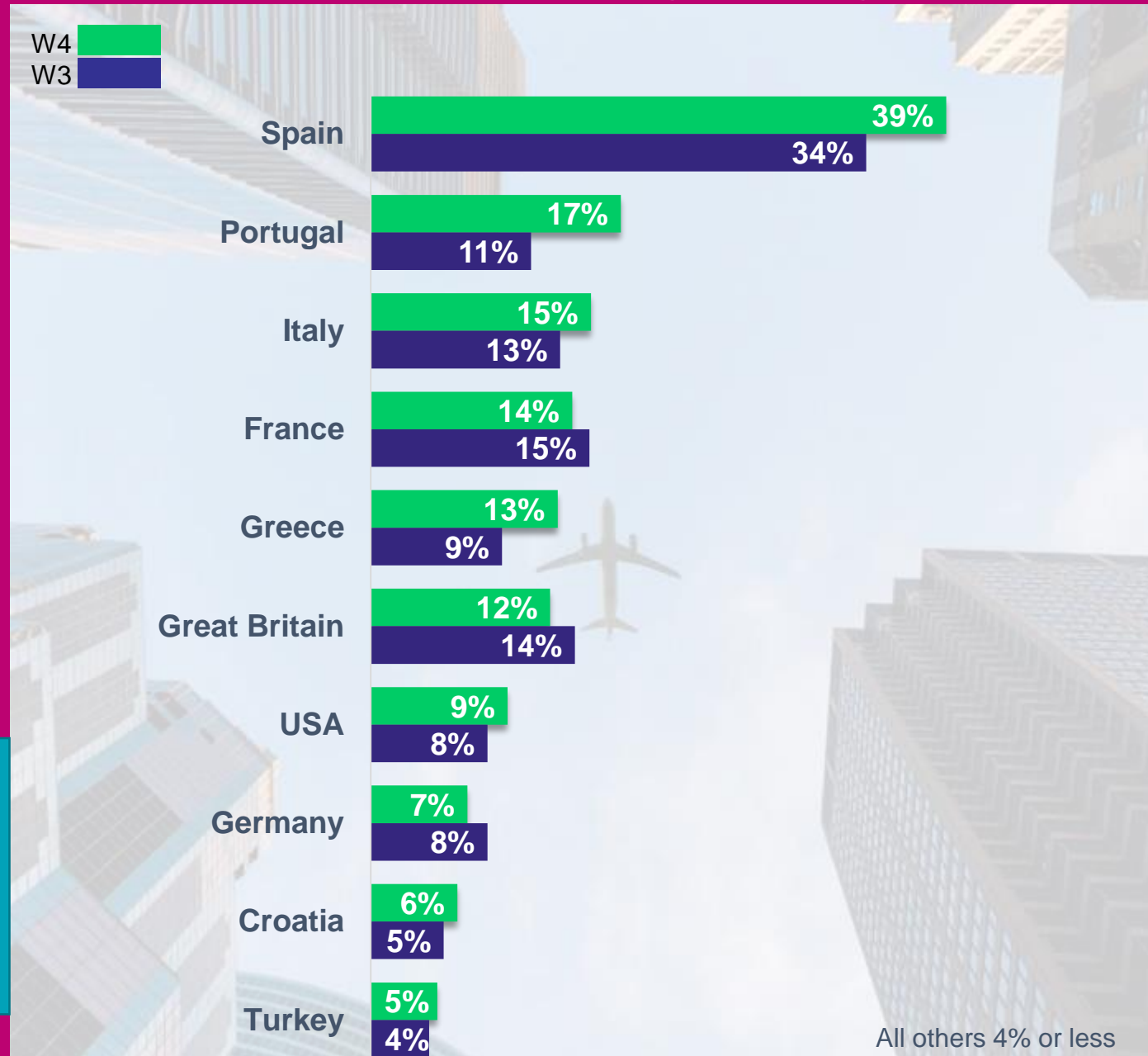
Unsurprisingly, Spain is the top destination abroad, while there has been a growing in interest in Portugal

With majority hesitant to book, NI could still win over some of this cohort

Of those intending to travel abroad this year  
**Just 14% have booked their trip**

Base = 179 – Intending on travelling abroad

Destination abroad attending on travelling to



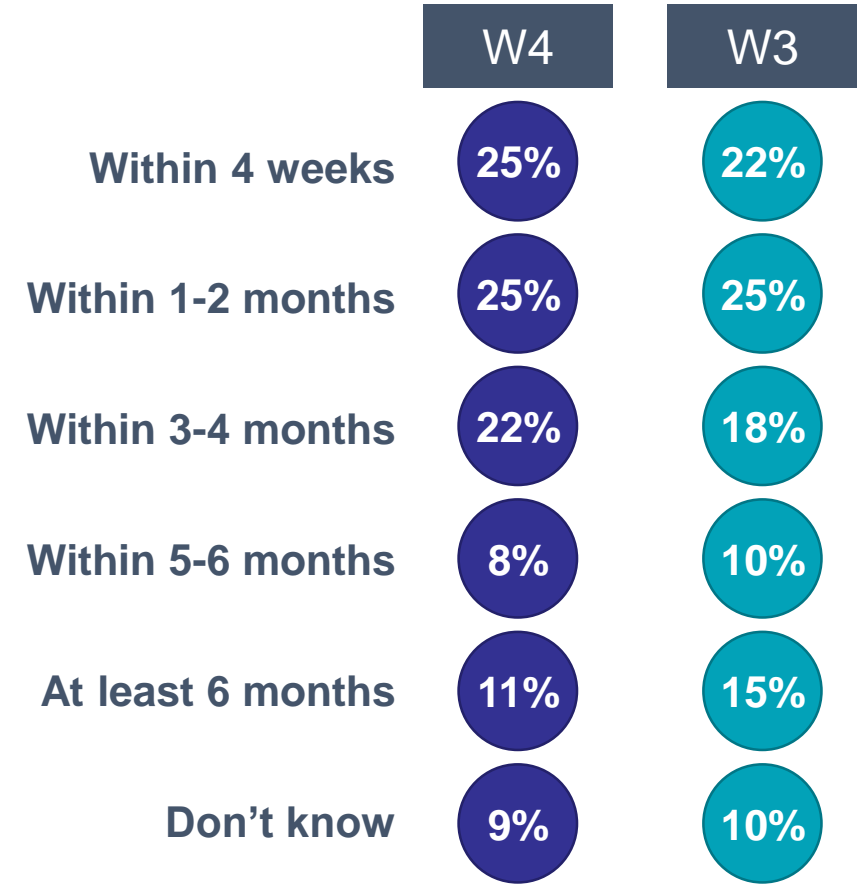
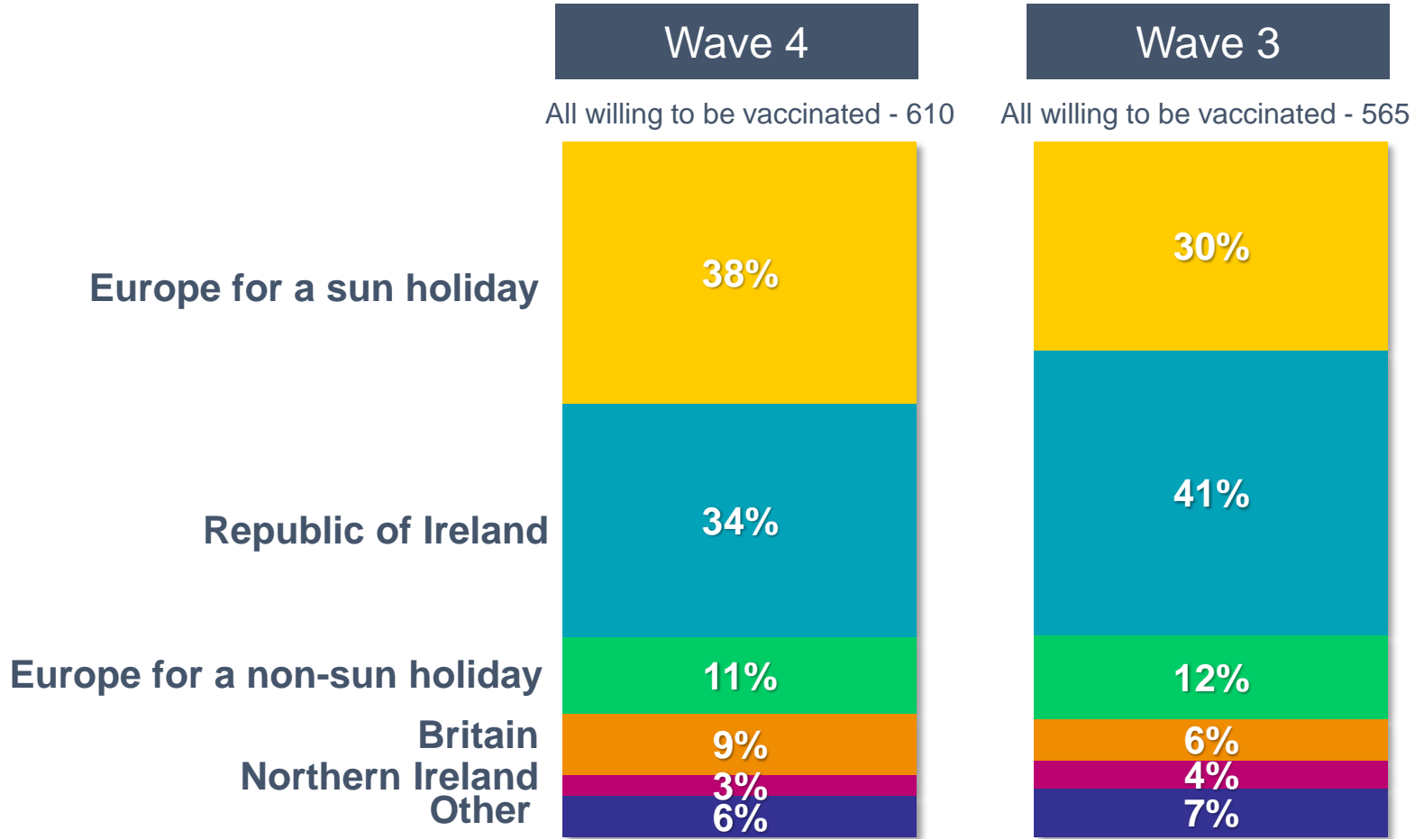
All others 4% or less

# Interest in European sun holidays rising vs. domestic breaks

## Watchout: lead-time between vaccination & holiday shortening

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

# Future Gazing



There's not one activity shining through  
However, highlighting the food and drink experience in NI  
will likely excite the most

Base = 750

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



Restaurants/Cafes

17%



City Sightseeing

13%



Pubs/Bars

12%



Nature Reserve/Park

10%



Walks/Hikes

9%

**Others of Interest:**

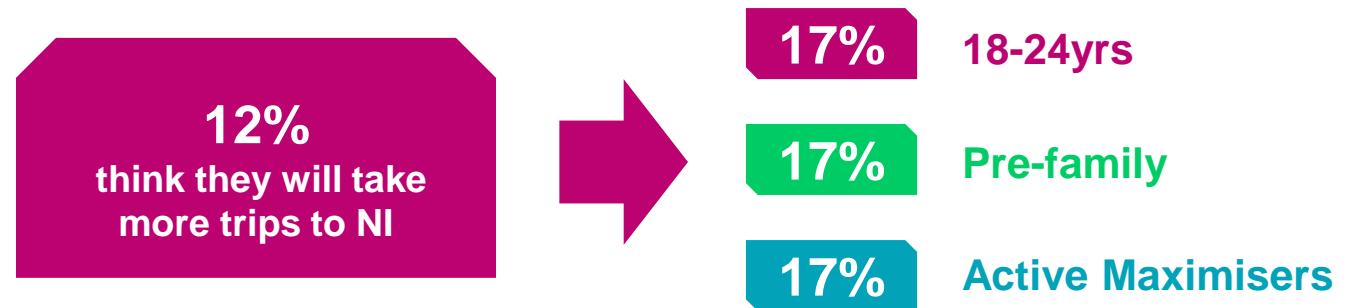
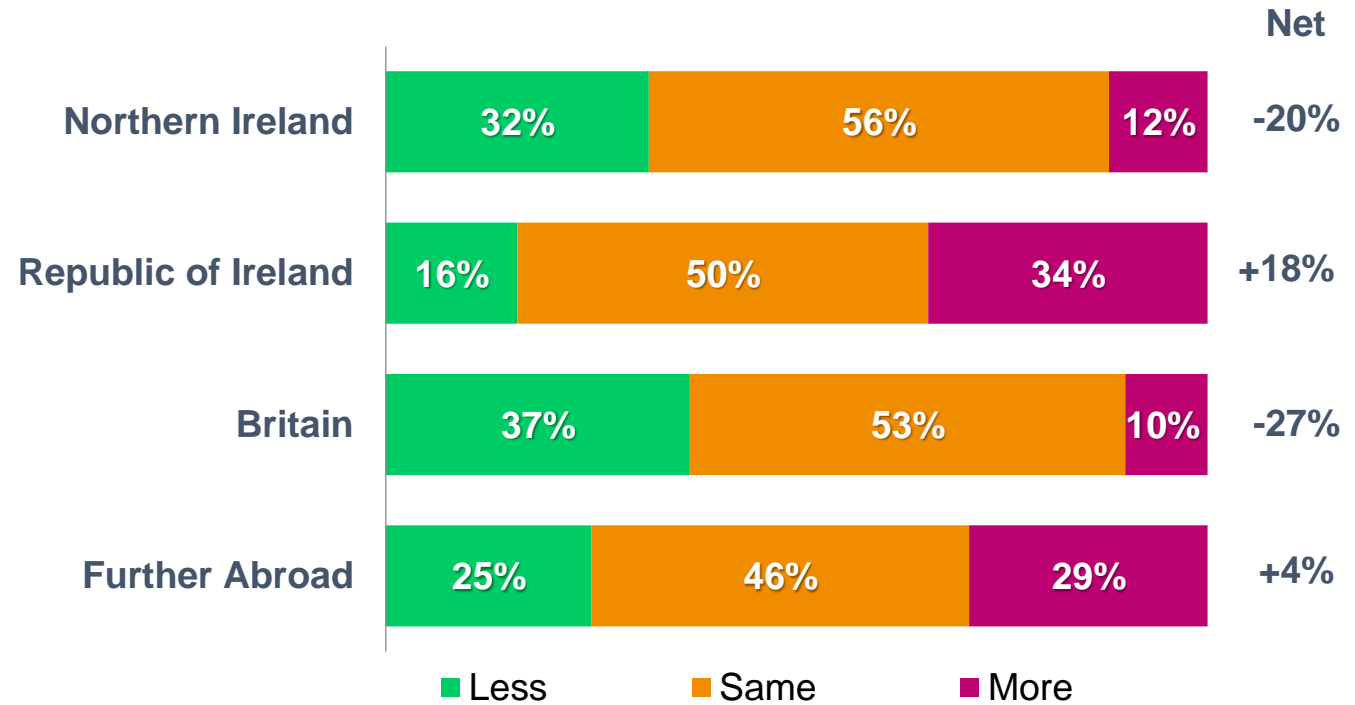
- Historic House/Gardens – 7%
- Spa/Relaxation exp – 6%
- Outdoor Sports/Activities – 5%

While circa half won't change their holiday behaviour compared to pre-covid, there is likely to be an increase staycations in ROI

Need convince people that NI is an attractive alternative to staycations in ROI

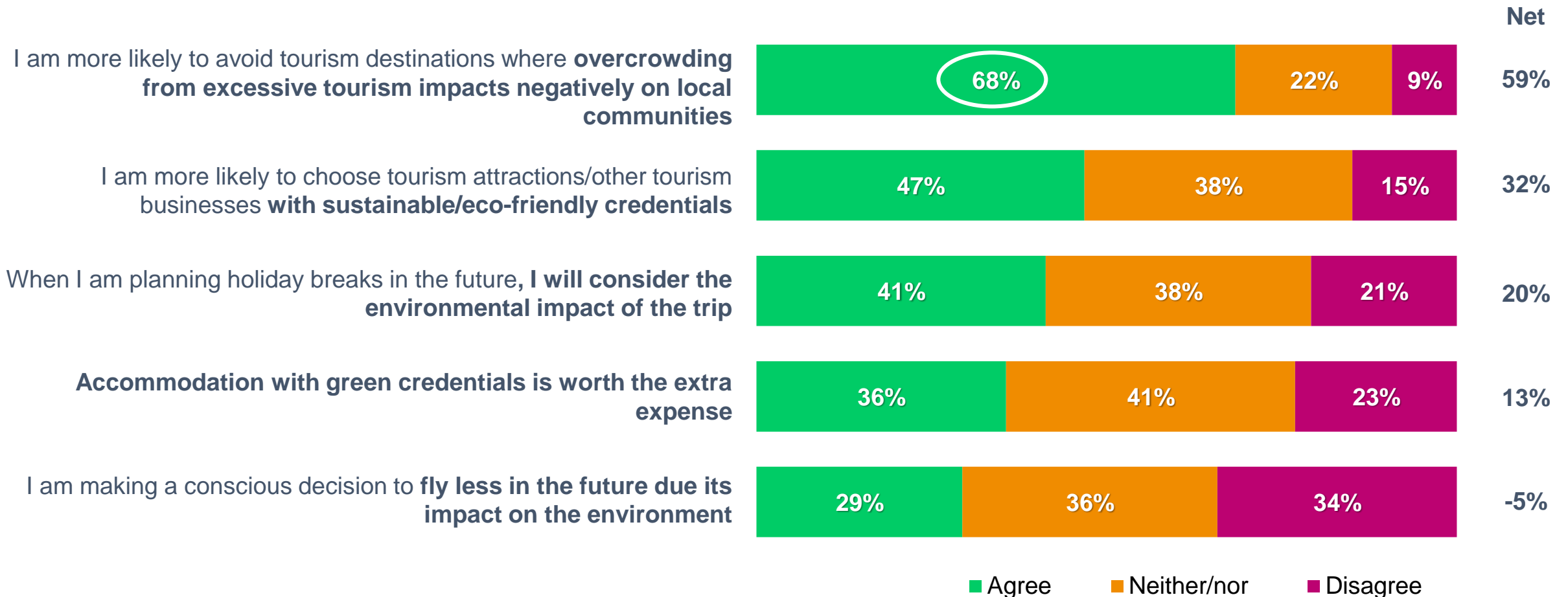
Base n = 750

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



# Sustainability is going to have a larger impact on where tourists decide to go – vital for businesses to futureproof their operations

## Future of tourism in a post covid world



Base n = 750

Q33. To what extent do you agree or disagree with the following statements in relation to the future of tourism in a post Covid world?

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

Base n = 750

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



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

7 in 10

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

Highest Amongst

80%

• Empty Nesters

74%

• Open-Minded Explorers

79%

• Intending on staycationing

# 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

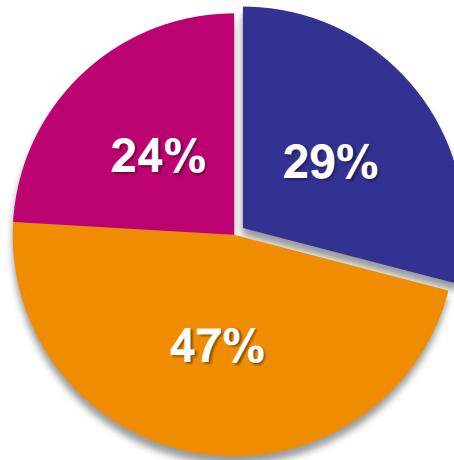
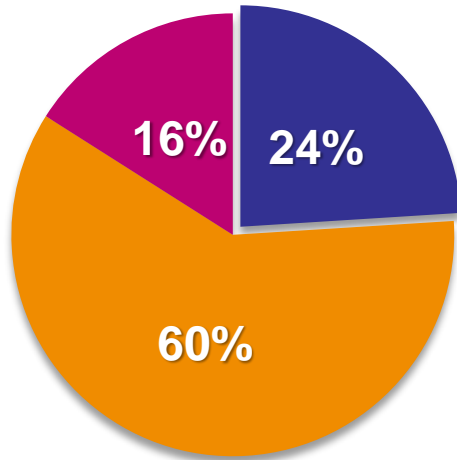




## Willingness to book **Outdoor** Event

Summer

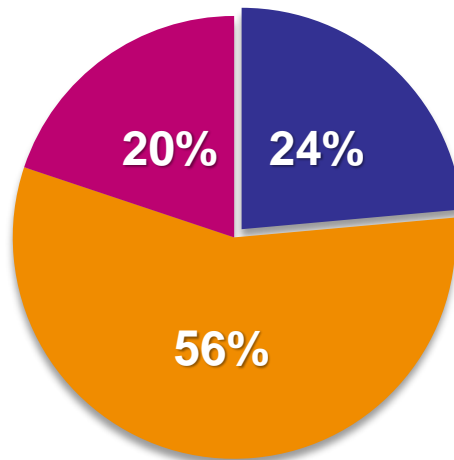
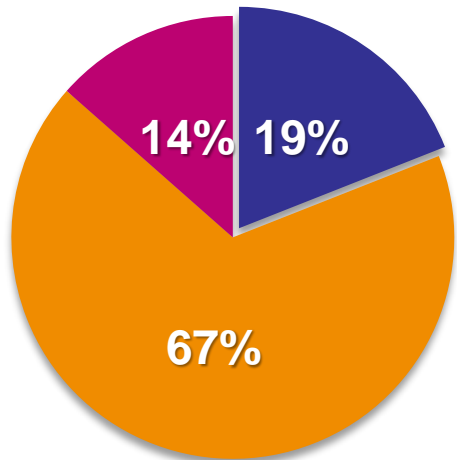
Autumn



## Willingness to book **Indoor** Event

Summer

Autumn

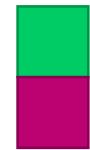


Outdoor events considered safer and safety perceptions improve marginally for Autumn

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

Base n = 750

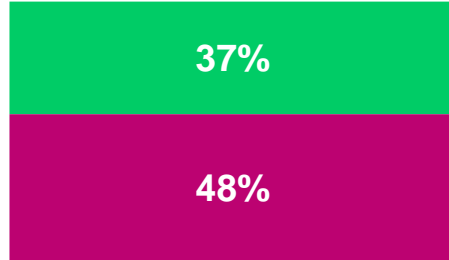
## Perception of Safety this Summer - Outdoor Event



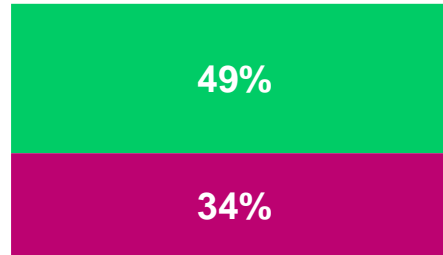
Safe

Unsafe

Large Outdoor Event



Small Outdoor Event



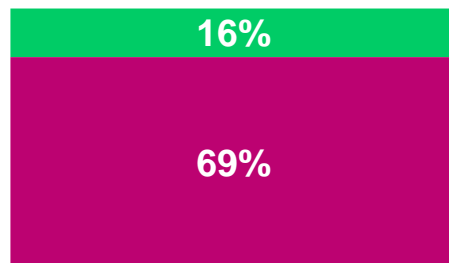
## Perception of Safety this Summer - Indoor Event



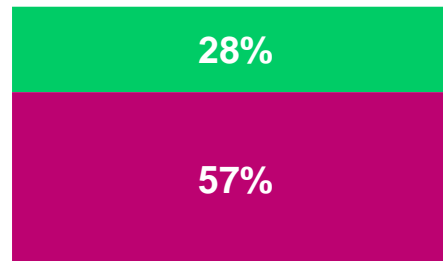
Safe

Unsafe

Large Indoor Event



Small Indoor Event

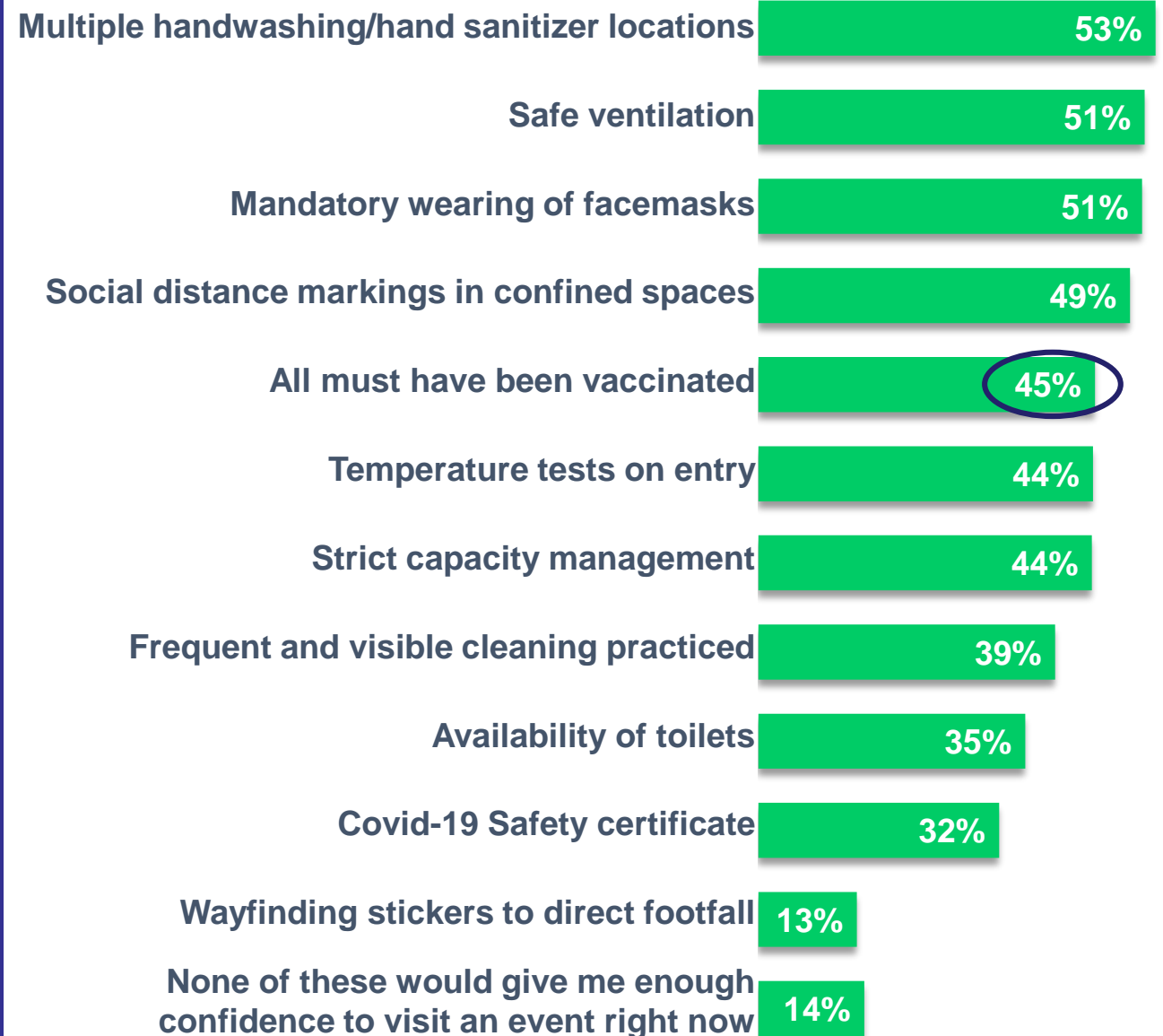


Small outdoor events are considered the safest option this summer

Promoting indoor events in NI this summer likely to jar with many

Base n = 750

## What would give reassurance that an event is safe to attend



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

Almost half calling for vaccination only attendees

Base n = 750