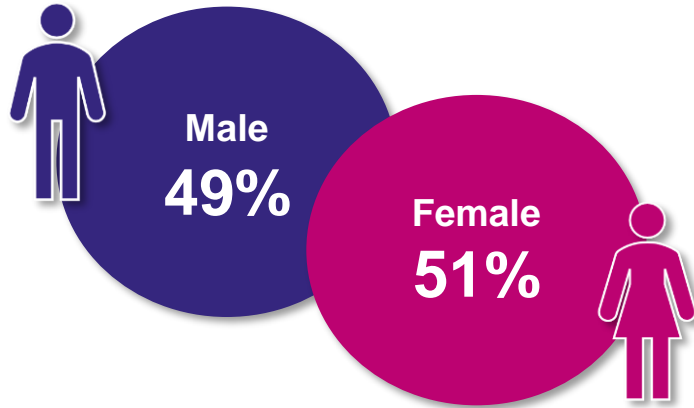


Consumer Sentiment ROI Market September 2020

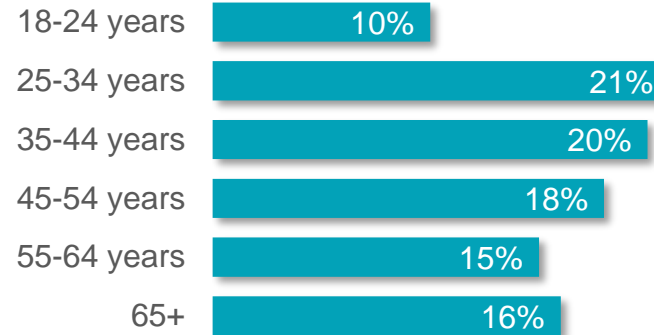


A robust, nationally representative sample of 751 in the Republic of Ireland

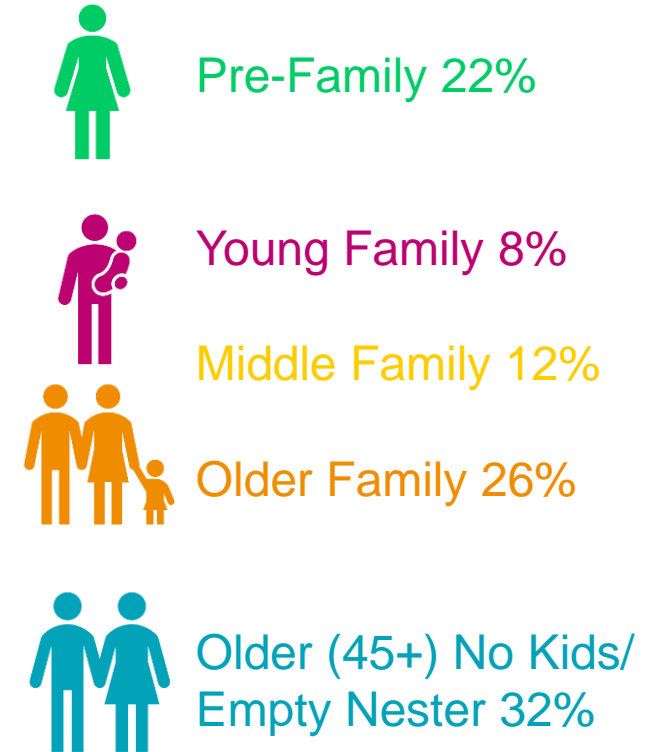
GENDER



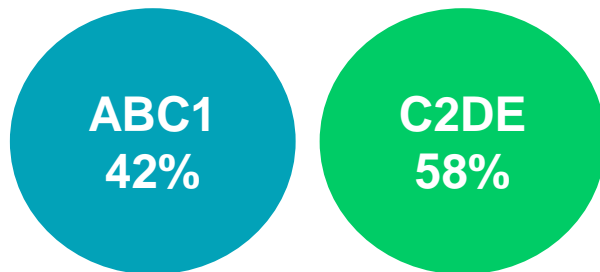
AGE



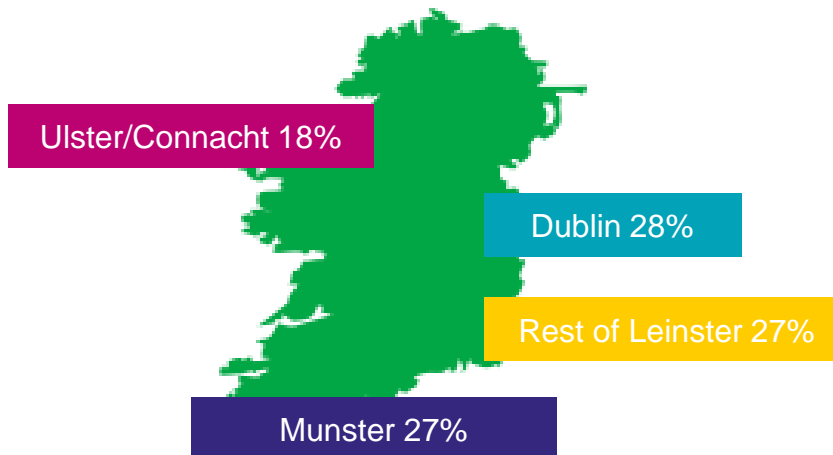
LIFESTAGE



SOCIAL GRADE



REGION



Key Findings

Pessimistic outlook prevails with Covid related anxiety still evident

Clear unease with engaging in indoor tourism activities, but good openness to outdoor activities

NI positively perceived as tourism destination with favourable views of Belfast and the beautiful countryside of NI. Also considered good/fair value for money

With Covid-19, safety and security is top of mind when considering holidaying in NI, while nature parks and castles the preferred activities if visiting

Positively, 1 in 5 have travelled to NI since July. Although there is interest in travelling to NI, holidaymakers are hesitant to book

To relax/rewind and get away from it all the top motivators to travel to NI. Younger groups taking longer breaks likely to spend considerably more than others

Covid-19 and Tourism



Negative outlook will continue to impact travel intentions

younger families most pessimistic

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

The worst is still to come

43%

Will stay the same

37%

The worst has passed

20%



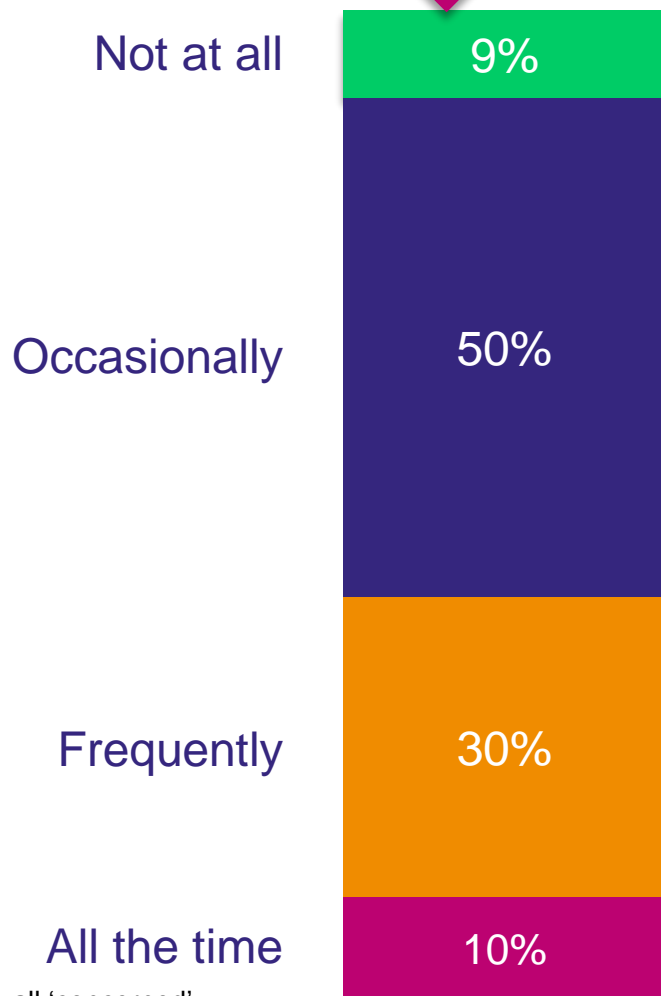
More negative outlooks among **25-34s** (49%), those with **Young / Mid Families** (49%), and those in **Leinster**, outside of Dublin (50%)



More positive outlooks among **45-54s** (26%), those in **Connacht / Ulster** (23%), those with **Older Families** (26%)

Widespread anxiety largely driven by fear of contracting the virus – Safety will be an important message to convey

How often have you felt anxious / concerned during Covid?



Main causes for concern



72% Me / family and friends getting Covid-19



65% Concerned about a second wave



60% Uncertain about the future



56% Uncertain about the economy



40% Worried about money

Older generations more worried about contracting the virus, **future uncertainty & money worries** more prevalent with younger groups



Me / family & friends getting Covid-19 **72%**

Highest Amongst

45+ year olds **76%**



Concerned about a second wave **65%**

Highest Amongst

45+ year olds **70%**



Uncertain about the future **60%**

Highest Amongst

18-24 year olds **71%**



Uncertain about the economy **56%**

Highest Amongst

Males **63%**

ABC1s **63%**

Leinster **63%**

Young Families **65%**



Worried about money **40%**

Highest Amongst

Under 45s **49%**

Young Families **55%**

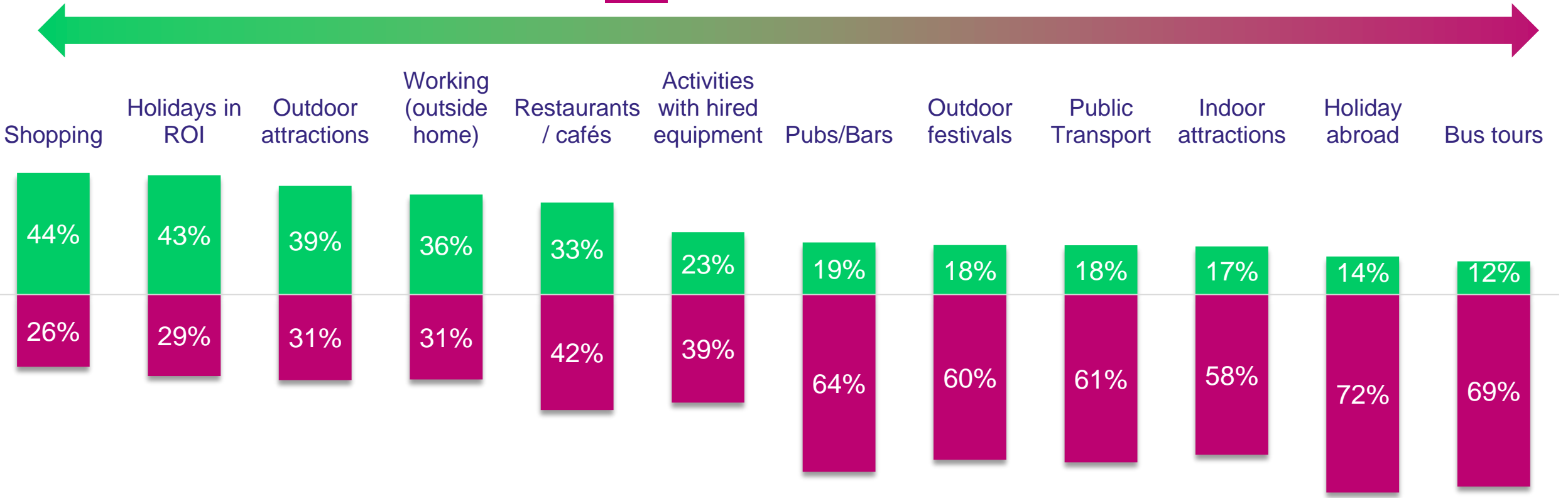
Anything involving being cooped up with other people makes us nervous – pushing outdoor activities will get best response

Levels of anxiety about general activities

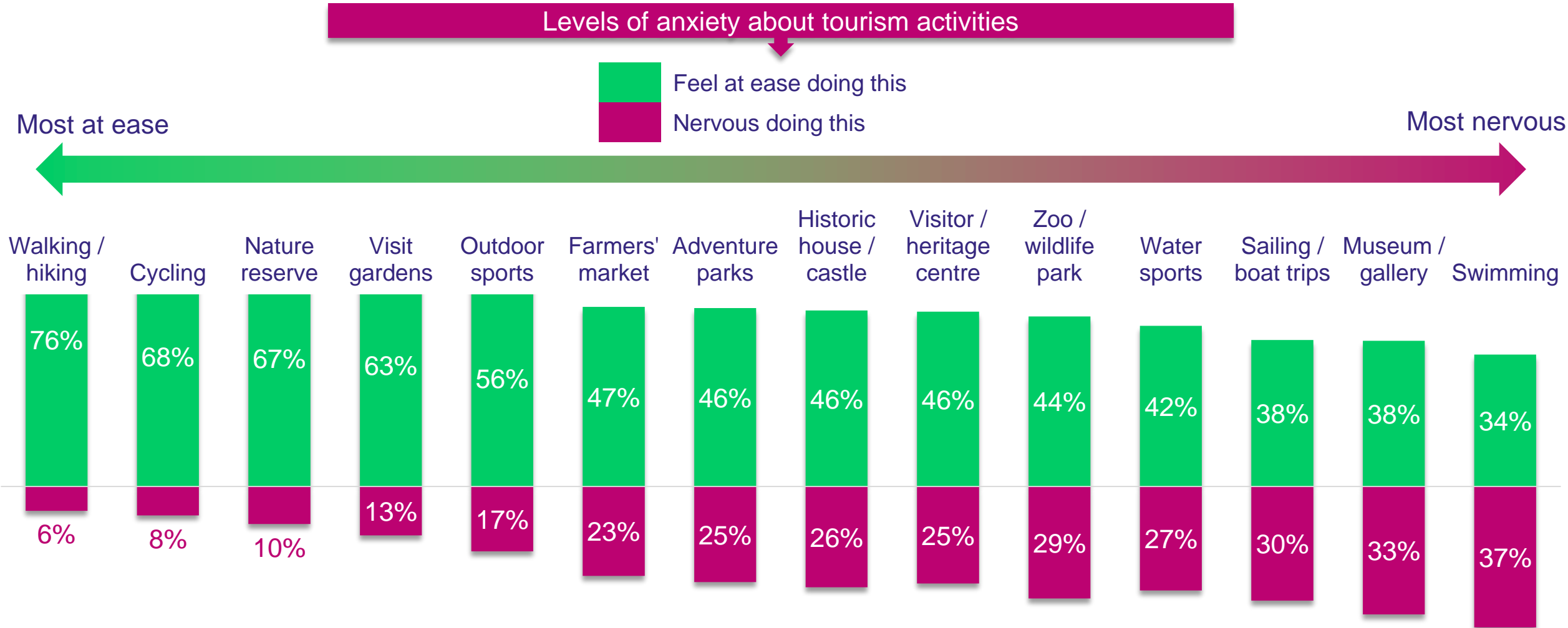
■ Feel at ease doing this
■ Nervous doing this

Most at ease

Most nervous



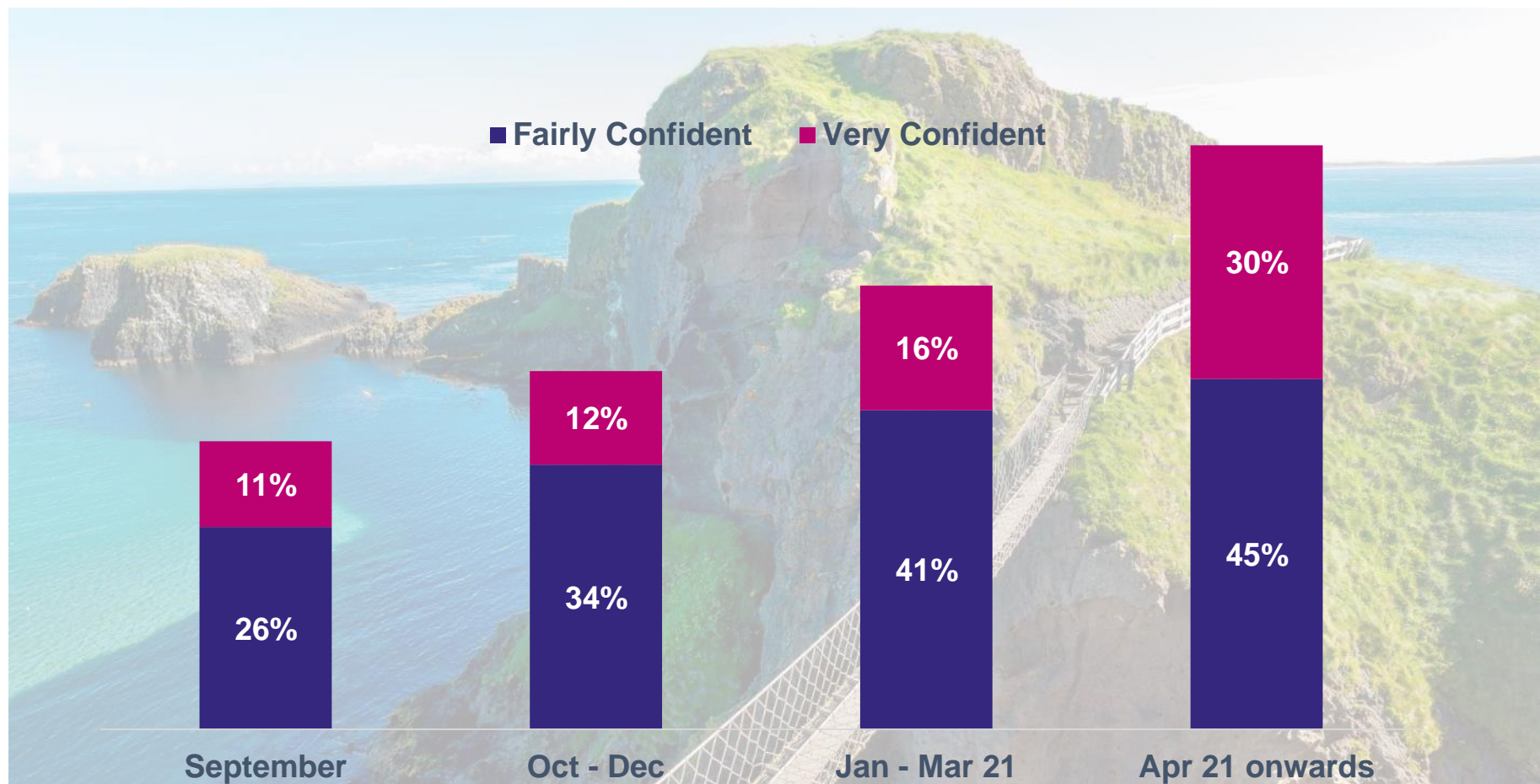
Less anxiety about holiday activities than day-to-day – people happier visiting gardens or castles than restaurants – need to capitalise on this



Confidence in holidaying on the Island of Ireland is low, improving in Q2 2021 – People need to be convinced to travel earlier

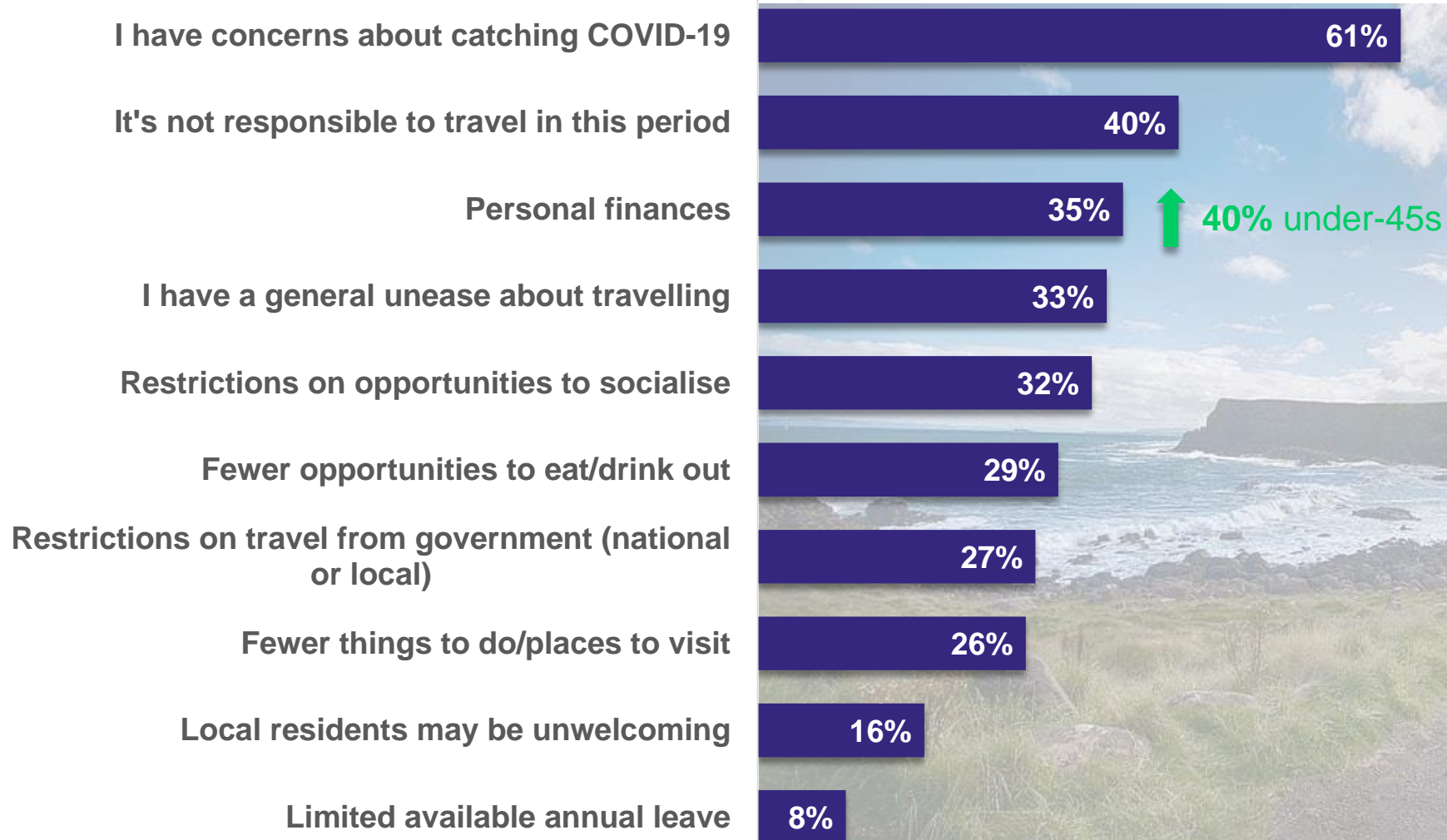
Only **37%** Confident in being able to holiday on the Island in September

Notably high amongst older groups aged 65+ (**46%**) and ABC1s (**43%**)



Feeling of unease around Covid-19 is the main barrier to travel – government restrictions less of a concern

Why would you feel uncomfortable taking a break in NI in September?



N = 469, all not confident about travelling in NI

Q6 Which of the following contribute to you being 'not very confident' or 'not at all confident' about taking a Northern Ireland short break or holiday in September?

Perception of NI as a Holiday Destination



Belfast & the countryside - positive recall for NI, but Covid still a concern – key factors that would resonate

What first comes to mind when you think of NI as a short break destination?



'Friendly people and beauty countryside and find Belfast a vibrant city'

'Nice beaches, Giants Causeway and the long bridge. Tours around Derry.'

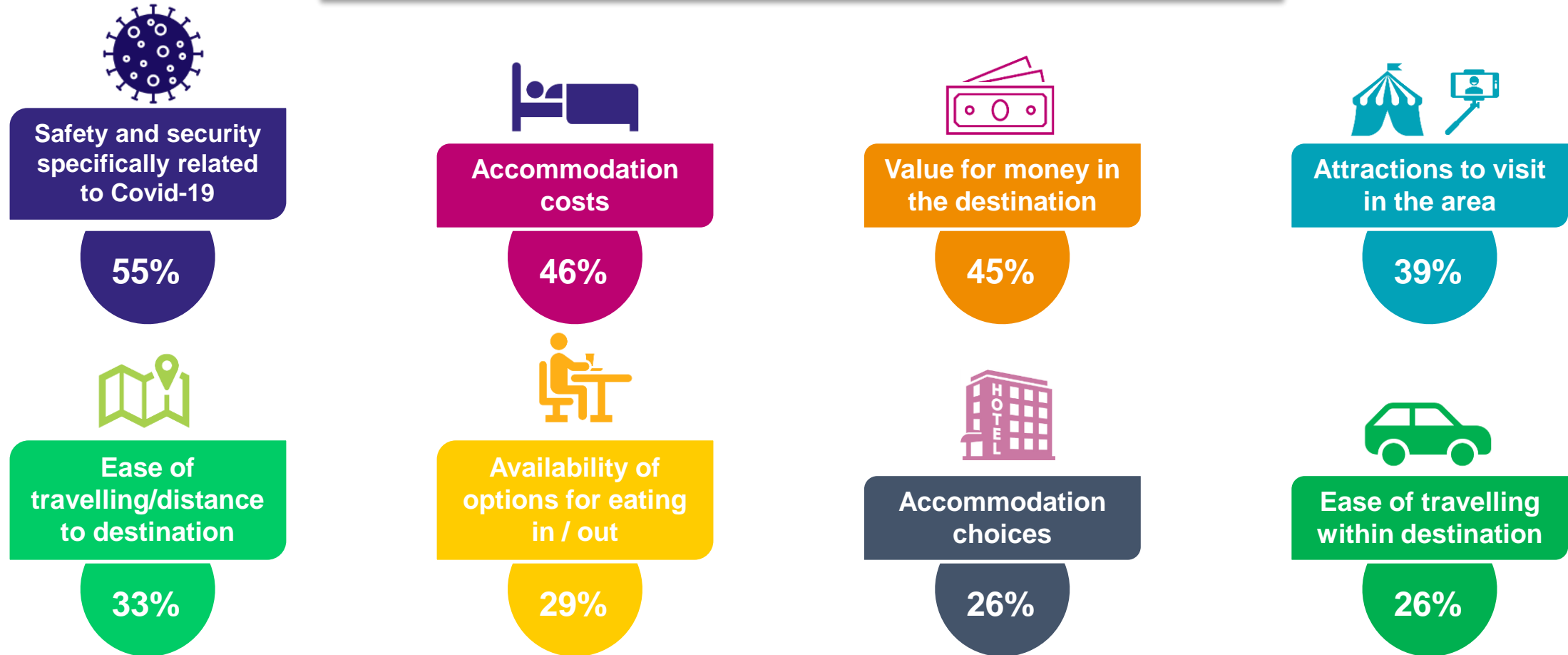
'Plenty of natural beauty as well as places/buildings of historical interest. Easy to travel to/from the Republic.'

'I'd be happy with Northern Ireland as long as there are luxury hotels, good restaurants, and good shopping - but ONLY when Covid is no longer a threat'

'It's a great place to visit, but I would be worried about attitudes to Covid 19 as we do not seem to be acting on the same guidelines.'

With Covid-19, safety and security is top of mind when considering holidaying in NI – **reassurance is vital**

Short Break in Northern Ireland – Key Considerations

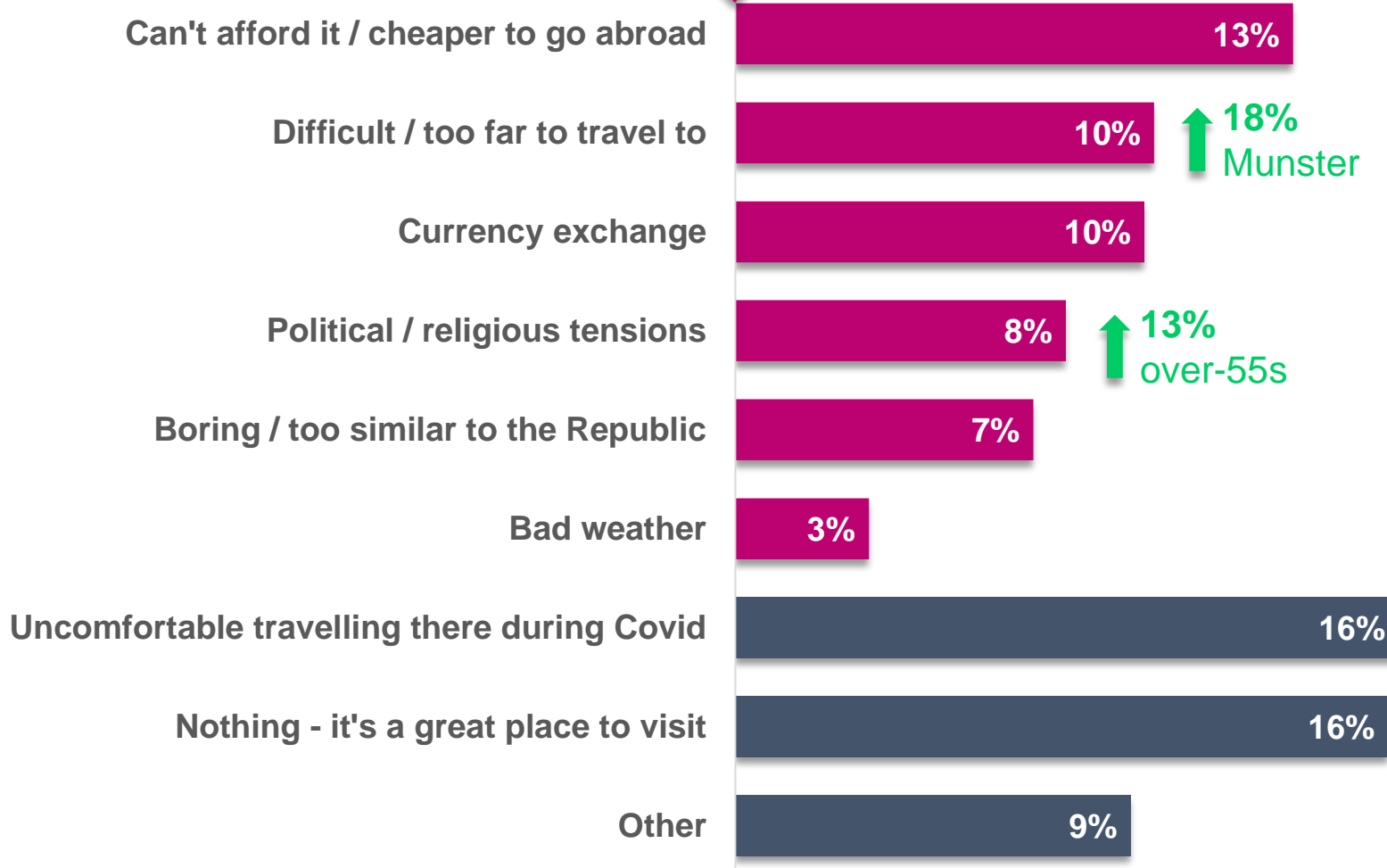


Base n = 751

Q15. If considering booking a short break in Northern Ireland, which of these factors will be most important in your decision on where to go and stay?

Other than Covid, **money and inconvenience** are the real barriers for most – need to dial up image of NI as an easy alternative to travel abroad

What would stop you holidaying in NI (other than Covid)?



'The image we have received over the years is hard to replace with one of easygoing people and happy occasions'

'Any advertising I have seen for Northern Ireland just shows the Titanic Centre and pubs'

'Expensive for a staycation, better value to just go abroad somewhere sunny'

Nature reserves and castles the preferred activities – zoos should also be pushed among those with young families

Top activities they would be interested in if holidaying in NI



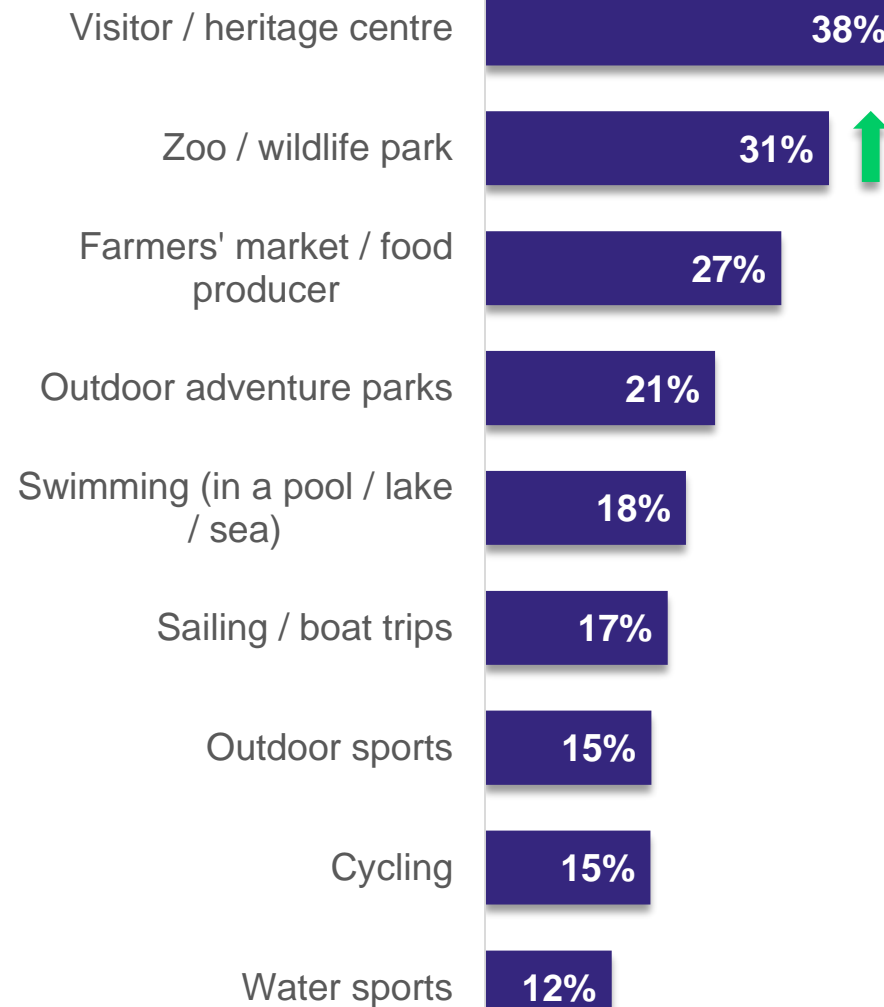
Historic house / castle, 51%

Nature reserve / national park, 50%

Visit gardens, 47%

Walking / hiking, 45%

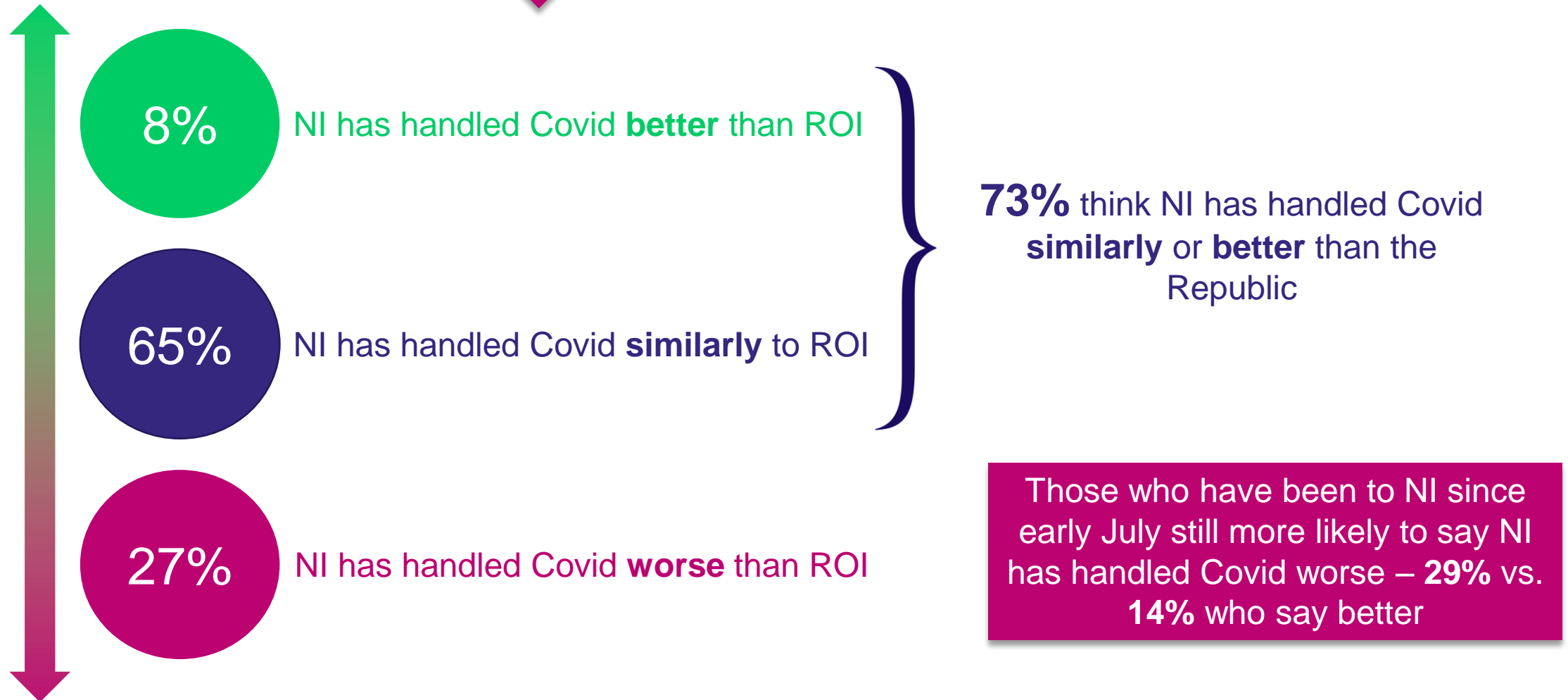
Visit a museum/gallery, 40%



↑ 49% young/
mid-family

Two thirds see little difference between handling of Covid in NI and ROI – unlikely to feel less safe in NI than at home

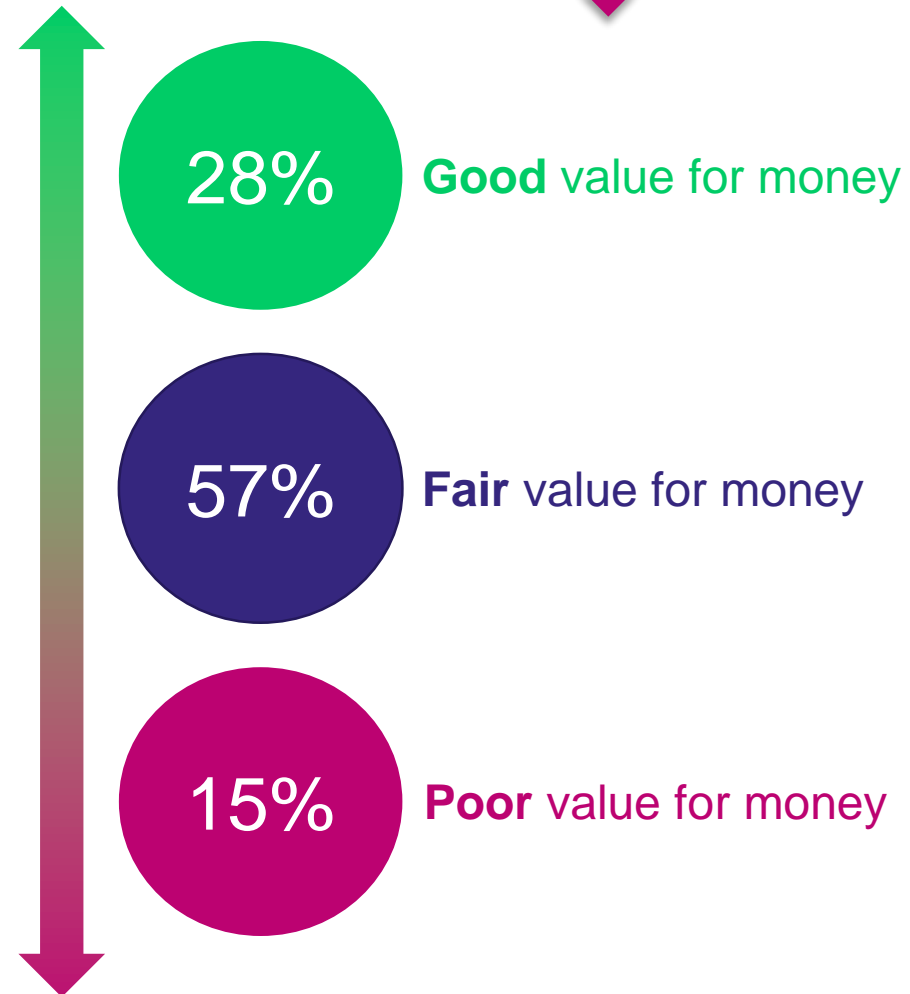
How well do you think NI has dealt with Covid, compared to the Republic?



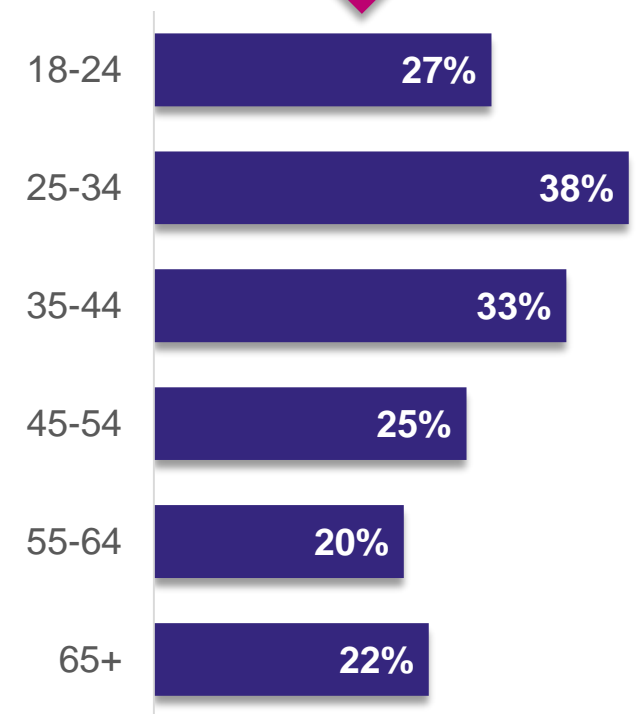
N = 751

Vast majority see NI as good or fair value for money – bigger influence on younger age groups

NI value for money as a tourist destination



% see NI as good value for money – by age group



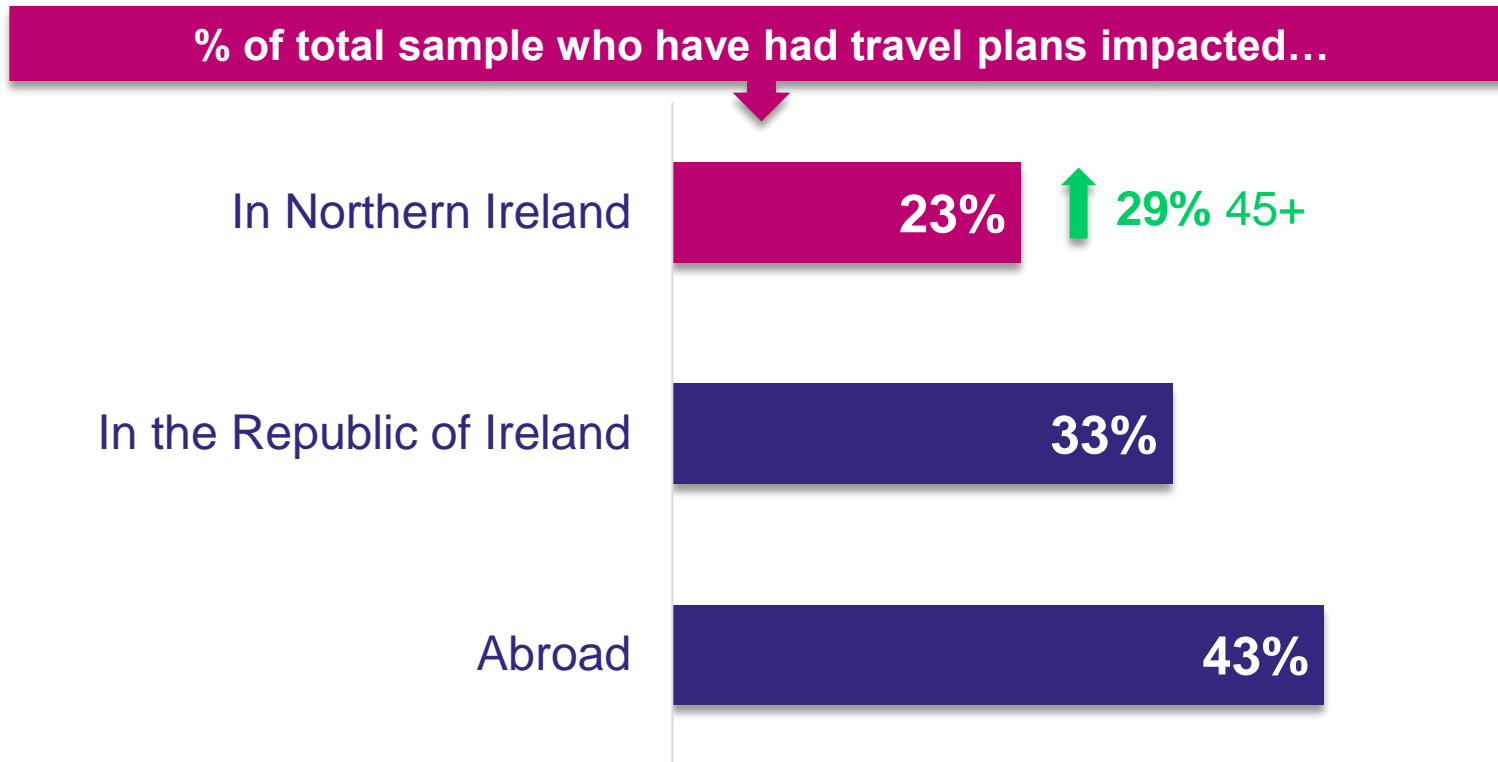
N = 751

Travel Intentions



A quarter had plans to travel to NI which were impacted by Covid – room to ensure these trips are not cancelled completely

64% have had plans to take a holiday either on the island of Ireland or abroad impacted by Covid-19



Despite, 1 in 5 have holidayed in NI since July, just 6% taking short trips - **Potential to encourage more overnight stay in NI**

Trips to Northern Ireland since July

18%

Have taken some sort of holiday in NI since July

Short Trip (close to home up to 12 miles/ 20 kms)

7%

Day Trip (more than 12 miles/ 20 kms from home)

8%

Short Break (1-3 nights)

6%

Long Break (4+ nights)

3%

Just less than 1 in 3 taking short breaks in ROI - Potential to encourage to choose NI instead for short trips

Trips in Republic of Ireland since July

60%

Have taken
some sort of
holiday in ROI
since July

Short Trip (close to home
up to 12 miles/ 20 kms)

32%

Day Trip (more than 12
miles/ 20 kms from home)

36%

Short Break (1-3 nights)

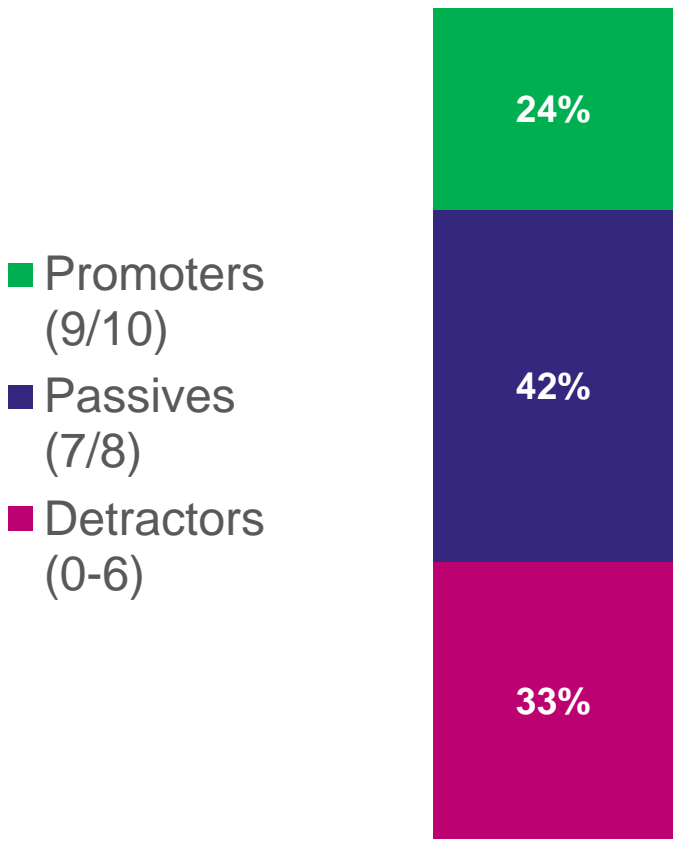
27%

Long Break (4+ nights)

9%

Negative NPS unsurprising as people unlikely to recommend travel at the moment – but positive with those who took longer trips

NPS – those who have travelled to NI since early July



NPS
-9

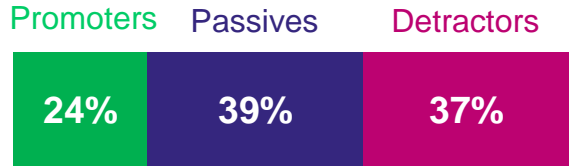
Day / long break
(at least one night's stay – n=61)

NPS
4



Short / day trip
(less than a day – n = 95)

NPS
-13



N = 137, all who have holidayed in NI

Intentions to holiday in NI spread out across next few months – important to encourage hesitant holidaymakers to book



N = 751

13% intend to take a short break to Northern Ireland

How much of your short trip have you planned

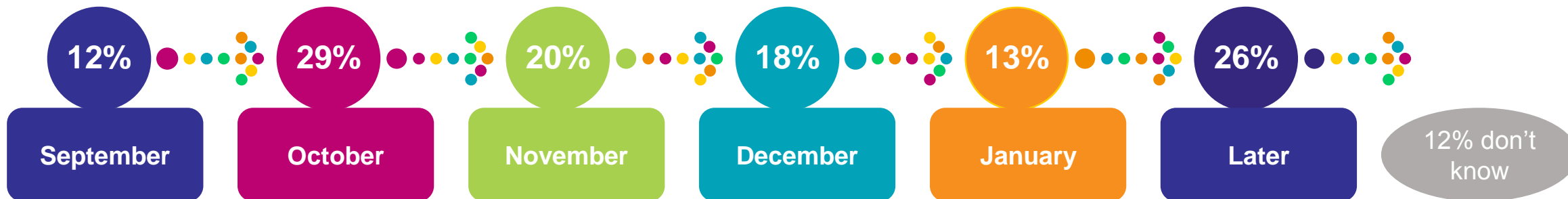
N = 96

Booked all of it Booked some of it Booked none of it



N = 96

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



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

Longer stay holidaymakers have at least booked some of it although many of them are waiting till February or later

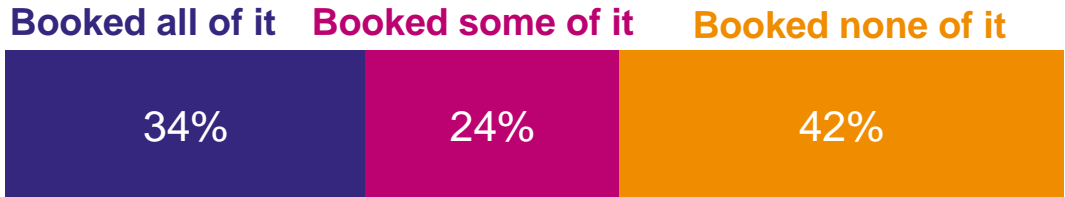
N = 751

6% intend to take a longer break to Northern Ireland



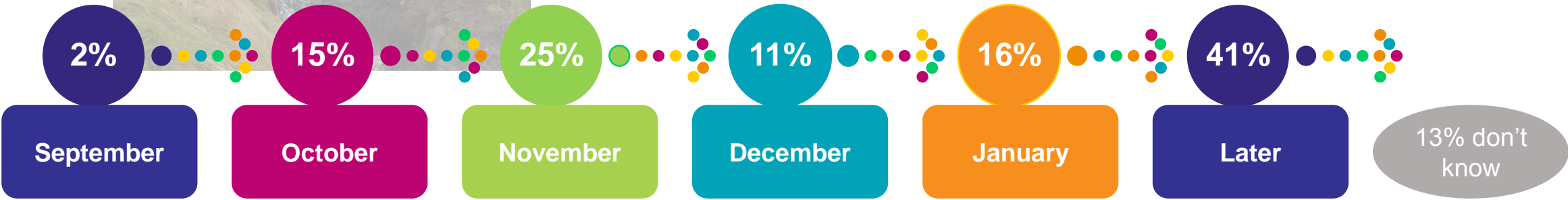
How much of your longer break have you planned?

N = 44
(caution low base size)



N = 44
(caution low base size)

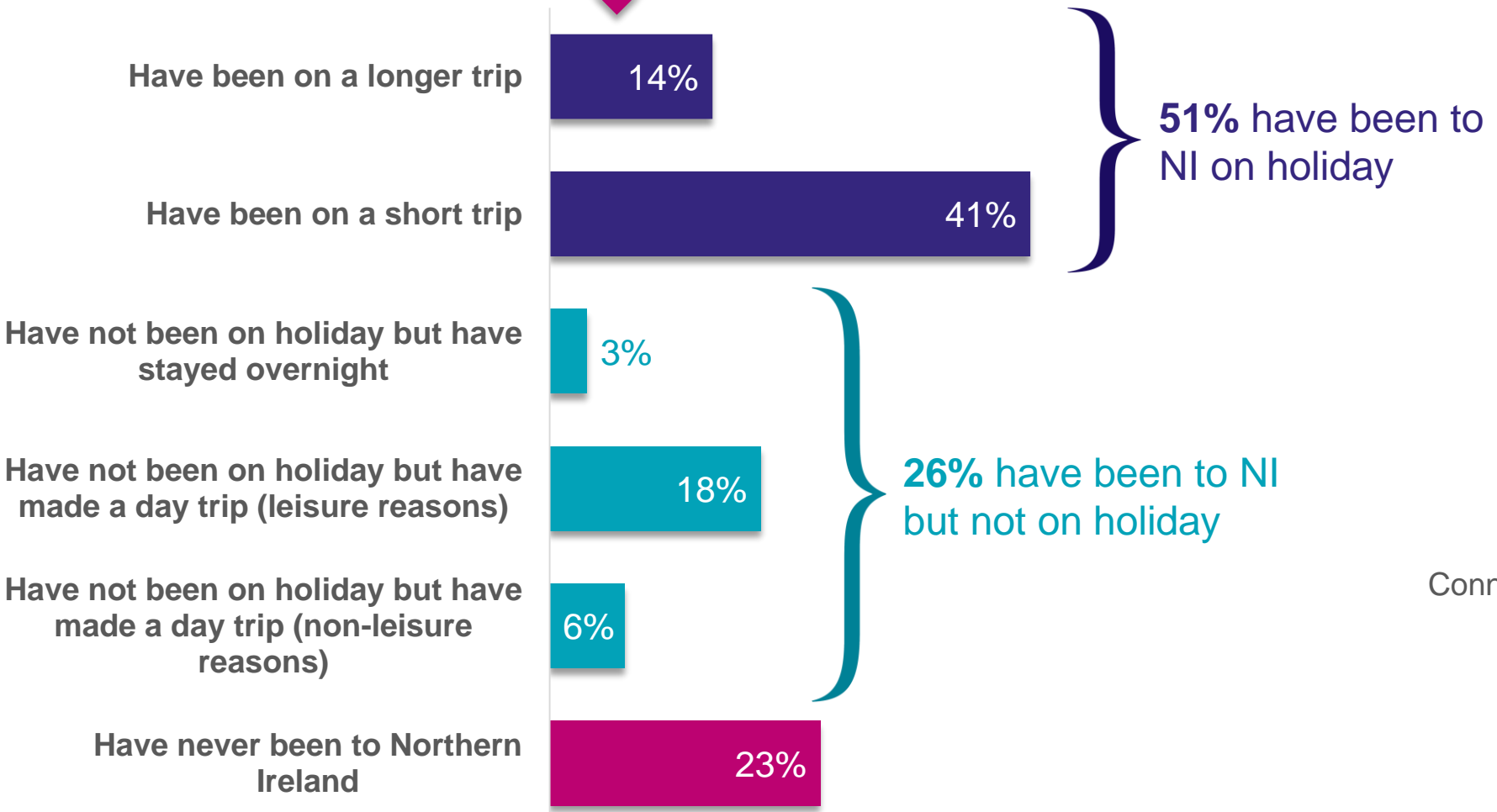
*Intention to take a longer break to Northern Ireland in:



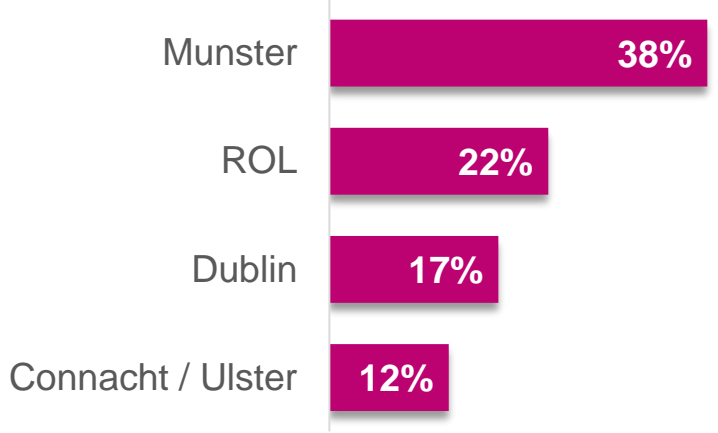
*Respondents could be intending on going on more than one trip

Untapped potential as half of people in ROI have not holidayed in NI – need to convince them now is the time

Have you ever been to Northern Ireland...?



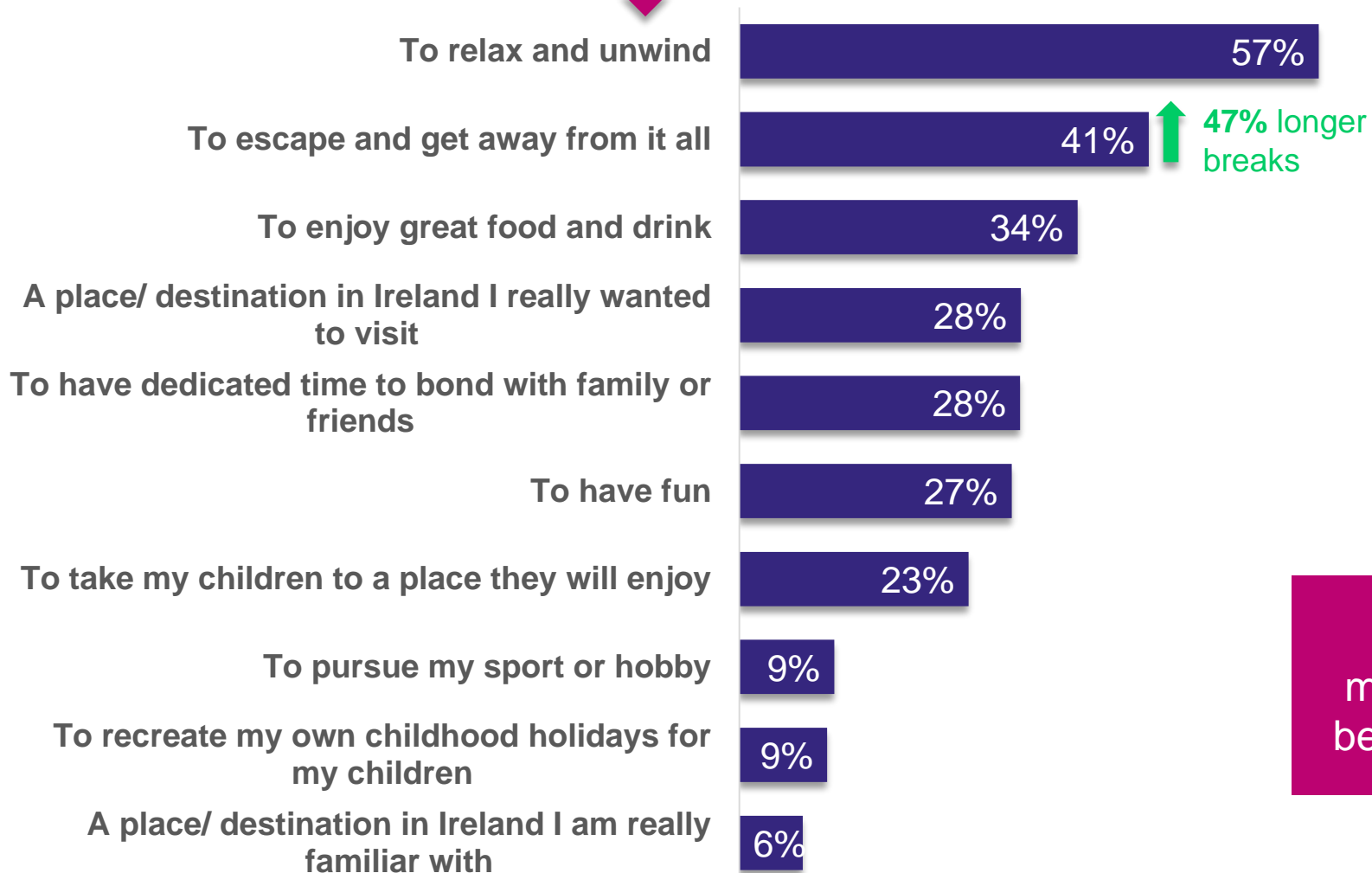
23% have never been to NI – clear regional split here



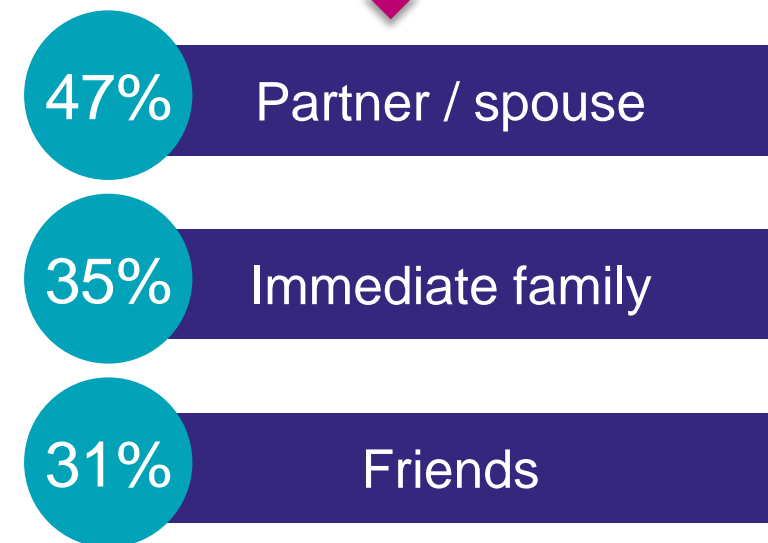
N = 751

A variety of motivations for travel, but a clear sense that **people need to get away from it all at the moment**

Motivations for longer / short breaks (combined)



Who travelling with



Few significant differences in motivation and travel companions between shorter and longer breaks

N = 96, all who have a short trip planned + 44, all who have a short trip planned

Younger groups taking longer breaks are likely to spend most – average spend on activities overall is above €100

Average expect to spend on upcoming trip per night



	Avg. spend on accommodation	Avg. spend on activities
Under 45s (n=64)	€96	€118
Over 45s (n=44)	€70	€85
Those with children (n=63)	€92	€106
Those without children (n=45)	€70	€103
Long break (n=44)	€107	€116
Short break (n=96)	€83	€106

N = 96, all who have a short trip planned + 44, all who have a short trip planned