



Consumer Sentiment Research

ROI Market – Takeaways for Industry

Wave 6 • December 2021

Introduction

The sixth wave (W6) of Tourism NI's Consumer Sentiment Research (carried out 11th November to 1st December 2021), surveyed a representative sample of the Republic of Ireland (ROI) population to assess the evolving 'consumer mood' towards COVID-19, prevailing attitudes/motivators to travel to Northern Ireland (NI) from ROI as well as understanding recent travel experiences to NI. This summary document should be read in conjunction with full survey results.

Of those surveyed, 55% were in the ABC1 social group and 45% were in the C2DE group. 51% of those surveyed were female and 49% male. 24% of those surveyed were pre families, 11% were young families, 13% were middle families, 22% were older families and 30% were empty nesters/older/no kids.

This survey took place as the warnings were issued about the health service facing its worst winter. Important to note media coverage relating to the Omicron variant did not emerge until the latter stages of the research.



Link to full survey results [HERE](#)

Summary

Given underlying concerns around safety, the rise in case numbers and the emergence of the Omicron variant in the later stages of the survey, findings from the sixth wave of the research have highlighted evolving market conditions for industry to be aware of.

There is now a more negative outlook, with ROI safety perceptions being significantly harder hit than NI - this continues into spring. Confidence in being able to travel has dipped from a high of 58% to only 29%.

Encouragingly, we are seeing NI as continuing to be viewed differently by the ROI market in terms of value, with an emphasis on quality as opposed to what has historically been a value offer based on price. 92% of those who travelled to NI said their expectations were met or exceeded. This sentiment is particularly evident among Active Maximisers and Indulgent Relaxers.

The positive shift in consumer perception will help to inform industry marketing and messaging to the ROI target market in 2022. When looking at marketing campaigns for 2022, industry should also refer to the [ROI Market Review](#).

COVID security is still the number one factor when considering a break in NI (40%) with good value for money second most popular at 36%. In relation to offers, the option to cancel with a full refund is most likely to encourage people to travel to NI (44%).



[Link to full survey results **HERE**](#)

Wave 6 Survey – Key Points



9% have taken some sort of holiday for leisure purposes in NI since September 2021 and of those, an encouraging **55% visiting for the first time.**



Travel intent to NI (next 3-4 months) actually grows vs. the previous wave for both short and long trips.



Trip satisfaction amongst those who have already visited NI was high, with **92% saying their expectations were met or exceeded.**



Sense of welcome and hospitality is strongly felt with this the top-rated aspect of trips for those who have travelled to NI.



Of those considering a trip to NI in the next 3 to 4 months, **17% are considering a day trip, 17% a short break and 9% a longer break**



When asked what offers would increase the likelihood of taking a short break in NI, **refunds and special offers were most likely to encourage consideration.**

Link to full survey results [HERE](#)

Checklist for Industry

The following **Checklist for Industry wishing to target the ROI Market** reflects the key findings from this current Consumer Sentiment Survey.

Product and Experience



Business Operations, Premises and Staff



Marketing Activity



Product & Experience

Assess your product(s) and experience(s) against the core motivators/needs set out in the [ROI Market Review](#) (December 2021). Identify which elements have most appeal, how could you enhance their appeal and make the experience more compelling?

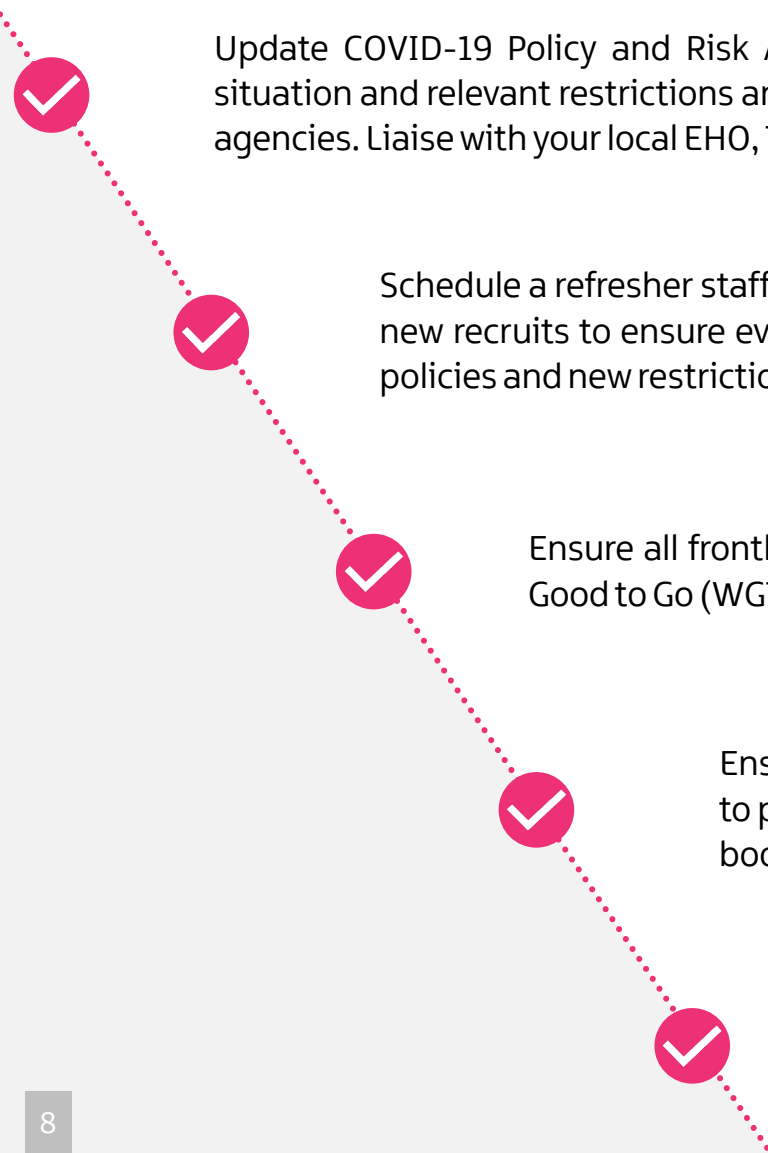
Relax and escape is the primary motivator with a wish to have fun and need to escape/get away also important considerations.

Note the shift in motivations to travel in W6, with increased confidence that consumers would be able to take a short break holiday on the Island of Ireland from early spring, with a significant uplift in the number considering short breaks and increased confidence in travelling to NI by summer 2022.

Visitors are still actively looking for flexible booking terms and the option to cancel and this will be an important consideration when choosing to book.



Business Operations, Premises and Staff



Update COVID-19 Policy and Risk Assessment to ensure it accurately reflects the current situation and relevant restrictions and updated guidelines issued by NI Executive or Statutory agencies. Liaise with your local EHO, Tourism NI or industry body for advice.

Schedule a refresher staff training session early in 2022 to update staff and include new recruits to ensure everyone is fully conversant with updated COVID-19 Safety policies and new restrictions and guidelines.

Ensure all frontline staff understand the ethos and criteria behind We're Good to Go (WGTG) and can communicate this effectively to customers.

Ensure your T&Cs and cancellation policy remain prominent to potential bookers, i.e., free cancellation, flexible transfer of booking, flexible gift vouchers etc.

Assign a dedicated member of staff to deal with booking queries (online and by phone).

Marketing Activity

NI tourism industry should continue with regularly updated, accurate COVID-secure messaging to alleviate the feelings of anxiety.

Value for money has become nearly as important as COVID-security in the mind of consumers, this delicate balance must be carefully communicated across all communication channels

Develop messaging/content/high res. images/videos etc, shaping this to appeal to the revised ROI market segments. Focus messaging around 'relax and unwind' and 'get away from it all', as well as emphasising safety reassurance and affordability and ease of taking a break in NI. Imagery depicting, green, open spaces, walking, hiking and outdoor activity will resonate across all target markets.

Support local messaging and sustainability/good environmental credentials still important messages to promote, particularly in light of increased focus driven by COP 26.

Despite the anxiety around indoor activity, pubs and restaurants scored highly amongst ROI visitors when rating aspects of their trip. Highlighting the quality of the local food and drink offer and related experiences will continue to differentiate NI in a very competitive market, with quality imagery and videography driving bookings.



Marketing Activity (similar to last survey)

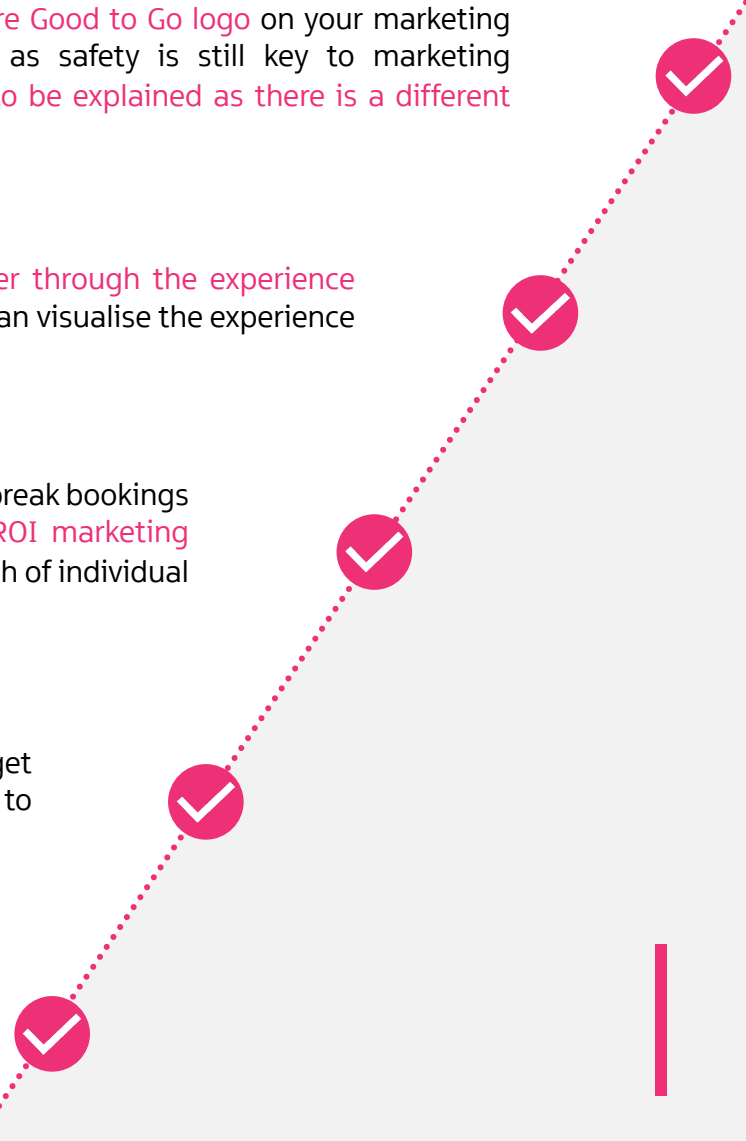
Clearly display a link to your COVID-19 Safe Policy and your We're Good to Go logo on your marketing material including your booking platform and social media as safety is still key to marketing communications. Remember the WGTG quality mark will have to be explained as there is a different equivalent mark in ROI.

Consider the use of blogs/vlogs/video diaries to take customer through the experience including arrival and safety procedures. The more the customer can visualise the experience prior to visit the more confident they will be about booking.

Revise your 2022 Digital Media plan to attract last minute short-break bookings and engage with spring 2022 Tourism NI and Local Council ROI marketing campaigns and social media platforms to drive and increase reach of individual marketing activity.

Revise and update email databases and customer lists to target returning customers, particularly those who have propensity to reschedule.

Add T&Cs and cancellation policy to booking platform as well as a FAQ section and customer feedback function to your website.





Produced in December 2021 by the Tourism NI Insights and Intelligence Service.

Click [HERE](#) to view full Wave 6 Consumer Sentiment results.