



Consumer Sentiment Research

ROI Market – Takeaways for Industry

Wave 5 Report • September 2021

Introduction

The fifth wave (W5) of TNI's Consumer Sentiment Research (carried out 12th August to 27th August 2021), surveyed a representative sample of the Republic of Ireland (ROI) population to assesses the evolving 'consumer mood' towards COVID-19 and prevailing attitudes/motivators to travel to NI from ROI.

The research also reflects the balance of our key market segments. Of those surveyed 28% were pre families, 13% were young families, 9% were middle families, 16% were older families and 35% were empty nesters/older/no kids.

The fifth wave of the survey finds that COVID anxiety remains relatively stable in the ROI market, with mindsets not changing significantly, therefore **it is important the NI tourism industry continues with cautious, COVID-secure messaging**. High levels of comfort around travelling within the island of Ireland over the remainder of 2021 contributes to optimism around ROI travel to the NI market. This is somewhat tempered by one stark statistic from this wave - **52% of the sample have yet to travel anywhere this year**. COVID-19 safety concerns still the top reason for not visiting NI.

Of those surveyed:



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13% were **young families**

9% were **middle families**

16% were **older families**

35% were **empty nesters/older/no kids**

Link to full survey results [HERE](#)

Introduction

The survey took place during concerns about rising COVID cases in both NI and ROI. It also reflects the improvement in the vaccine rollout in ROI, with more vaccine take-up in ROI amongst the younger age groups. It is also the first time that both NI and ROI are at a similar stage of re-opening, with the hospitality sectors both trading indoors for the first time since before Christmas 2021. **The survey highlighted a high level of caution around indoor activities/occasions with a marked decrease in unease around outdoor activities and venues.**

Only 18% of those surveyed think the COVID-19 situation will get worse (young families have a more negative outlook at 26%), with 43% thinking that the worst has passed and a more positive outlook among the over 65's (58%), Open-Minded Explorers (49%) and males (48%). Anxiety levels remain much the same with 18 – 34 year olds (46%) and young / mid families (44%) being most likely to feel anxious frequently / all the time.

On a positive note, **62% would be confident that they would be able to take a holiday on the island of Ireland in September without it being cancelled**, representing a positive uplift from the last wave.

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The survey also indicated an **increase in last-minute bookings in September and October**. Most are booking less than a month before their trip which will present a significant opportunity for NI tourism businesses who can offer the desired mix of good value accommodation and packages of activities and experiences, with a clear COVID safe message.

Link to full survey results [HERE](#)

Travel Motivations & Perceptions

8% have taken some sort of holiday in NI in 2021 and of those, **48% were visiting for the first time**. 44% of those who didn't visit at least considered NI, with more than half of these cancelling trips or not travelling at all.

Trip satisfaction amongst those who have already visited NI was high with 97% saying their expectations were met or exceeded their expectations. Indeed, 40% said the trip exceeded their expectations.

This wave indicated that **the perception of NI as good value for money is increasing** with a strong score for NI value for money.

Of those considering a trip to NI in autumn/winter 2021, **13% are considering a day trip, 15% a short break and 5% a longer break**.

Of those considering a visit to NI later this year, 45% are actively planning with short trip intentions higher with Active Maximisers (22%) and Indulgent Relaxers (20%). Of those planning long trips, 33% are actively planning with long trip intentions higher with Active Maximisers (9%).



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48% were visiting for the first time

Of those considering a trip to NI this year:

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15% are considering a short trip

5% are considering a longer break

Link to full survey results [HERE](#)

Industry Takeaways

The following pages highlight the key takeaways for Industry wishing to target the ROI Market, reflecting the findings from this current Consumer Sentiment Survey. They are broken down into the following categories:

Product and Experience

Business Operations, Premises and Staff

Marketing Activity

Product & Experience

Assess your product(s) and experience(s) against the core motivators/needs of key ROI market segments i.e. **Open to Ideas, Open Minded Explorers and Active Maximisers**. For further information click [HERE](#). Identify which elements have most appeal, how could you enhance their appeal and make the experience more compelling?

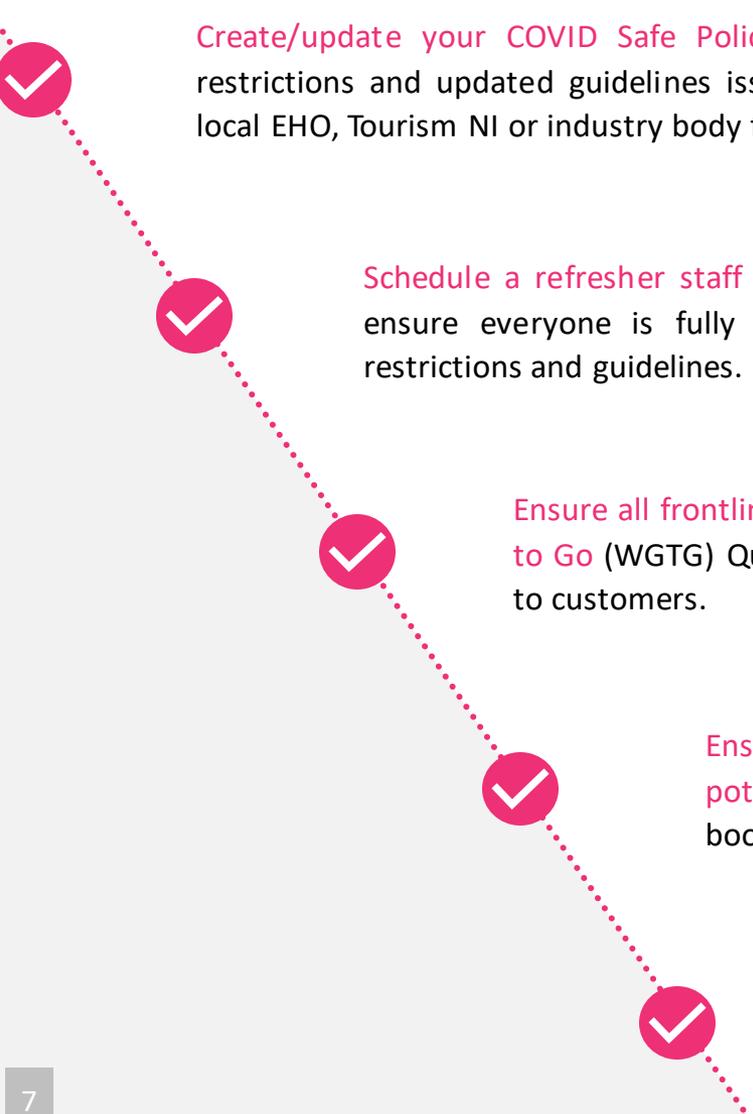
Note the shift in motivations to travel in W5 with 62% indicating they would be confident that they would be able to take a short break holiday on the island of Ireland in September and an uplift in the number considering short breaks in NI, **particularly last-minute bookings in September and October**.

Relax and unwind continues to be the primary **motivator (55% down from 58% in W4 survey)**. Need to escape/get away remains the number 2 factor (now 43% down from 54% in W4).

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



Create/update your COVID Safe Policy and Risk Assessment to ensure it reflects the relaxed 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 to update staff and include new recruits to ensure everyone is fully conversant with updated COVID Safety policies and new restrictions and guidelines.

Ensure all frontline staff understand the ethos and criteria behind We're Good to Go (WGTG) Quality Marque and that they 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 **cautious, COVID-secure messaging** to alleviate the feelings of anxiety, still very much prevalent in the ROI market.

Highlighting 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.

Support local messaging and sustainability/good environmental credentials are still important messages to promote.

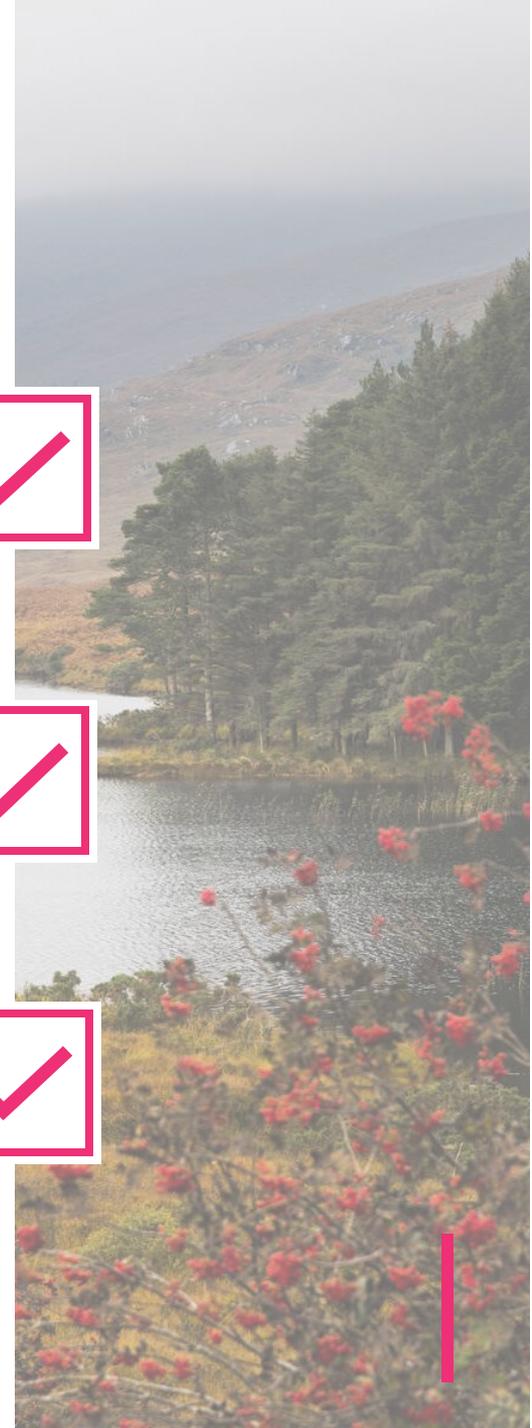


Marketing Activity

Develop messaging/content/high res. images/videos to appeal to those wanting to take a last minute short break in September/October. It is still important to shape this to appeal to the key market segments i.e. Open to Ideas, Open Minded Explorers and Active Maximisers, focusing on messaging around relax and unwind and escape and get away from it all (55% said to relax and unwind was top of their motivations to travel), safety reassurance and affordability and ease of taking a break in NI.

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.

Clearly display a link to your COVID 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 marque in ROI.



Marketing Activity (similar to last survey)

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 Digital Media plan for the Autumn season as the main tool for attracting last minute short break bookings, remembering to shape content specifically for each of your target market segments.

Ensure your testimonials and customer feedback function to your website are up-to-date and queries/concerns are responded to promptly. Ensure links with other platforms i.e. Trip Advisor are working.

Engage with Autumn Tourism NI and Local Council ROI Marketing campaigns and regularly contribute content to these social media platforms to drive and increase reach of individual marketing activity.

Add T&Cs and cancellation policy to booking platform and add a FAQ section to website to deal with common concerns and queries.



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

Click [HERE](#) to view full Wave 5 Consumer Sentiment Survey results.