



Consumer Sentiment Research

NI Market – Takeaways for Industry

Wave 4 • April 2021

Introduction

The fourth wave (W4) of TNI's **Consumer Sentiment Research** (carried out 23rd March – 6th April 2021), surveyed a representative sample of the NI population to assess the evolving 'consumer mood' towards Covid-19 and prevailing attitudes/motivators toward travel. The research also reflects the balance of our key Domestic market segments. This survey took place before the NI Executive's official announcement of re-opening dates. The last few days of the survey also coincided with the civil unrest in Northern Ireland.

Consumer confidence is increasing. Only 21% of those surveyed think the Covid-19 situation will get worse, down from a peak of 60% in Wave 2 (mid families have a more negative outlook at 43% as do 18–24-year-olds at 38%). **Almost two-fifths (39%) believe the worst has passed, with an even more positive outlook among the 44 plus age group with no kids (47%), ABC1s (45%) and Natural Quality Seekers (44%).** Anxiety levels remain unchanged. Getting sick is still the main concern among 59% of those surveyed, while 45% worry about another surge/new variant (this rises to 51% among younger families). While there is still more concern among the older population, 44% of 25–34 year-olds feel concerned/anxious frequently or all of the time. Lockdown fatigue is less of an issue with NI residents (43% in comparison to 55% in ROI).

Of those surveyed:



37%
Aspiring Families



38%
Natural Quality Seekers



25%
Social Instagrammers

[Link to full survey results HERE](#)

Introduction

Of those surveyed:

61%

are confident that a holiday in NI could happen late summer, rising to 68% in Sept & Oct 2021.

38%

Wave 3 = 29%
Wave 2 = 21%

Intend to take a short break in NI. 35% are most likely to take a break in NI before other destinations (up from 28%).

49%

ROI = 29%
GB = 26%
Abroad = 20%

Intend to take a break in NI if vaccinated.

The success of the vaccine rollout and reduction in case numbers has led to a renewed sense of optimism, and a discernible shift in perceptions from previous waves, which translates to a more optimistic mood towards travel. Wave 4 of the survey clearly demonstrates that **NI residents are open to ideas right now for a holiday in NI this year (up 7 percentage points to 54% in W4).**

This is highest among young/mid families (77%) and those aged 18-34 years (67%). However, three-fifths (up from 52%) said they would **only book if there were flexible booking arrangements for cancellations**. Almost half (49% - up from 43%) said they would do more staycations this year. When we look at the Domestic market segments, there is an 18 percentage point increase in openness to exploring ideas among Social Instagrammers (now 64%) and a 5 percentage point increase in Aspiring Families (now also 64%). Natural Quality Seekers have only seen a marginal increase.

77% of those surveyed stated they considered it safe to go holiday in NI this summer, rising to 83% in the autumn. **Only 28% thought it would be safe to go abroad this summer** and 37% in the autumn. Positive safety perceptions were highest among Aspiring Families (87%) followed by Social Instagrammers (77%) and Natural Quality Seekers (68%).

[Link to full survey results HERE](#)

Introduction



While most will feel at ease in engaging with outdoor activities this summer, **crowded confined spaces are still considered a safety concern.** Large scale events are a particular concern.



The survey also compared visitors' normal choice of accommodation pre Covid-19 against the propensity to choose now and found that there was **more risk of medium/larger hotels losing customers in 2021.**



Perception of value for money (VFM) in NI is strong relative to ROI. This increased perception (second only to Spain, above GB and considerably more than ROI which was considered worst of all) must be leveraged on marketing communications. 77% of those surveyed expect the cost of international travel to increase post Covid-19.

[Link to full survey results HERE](#)

Checklist for Industry

To maximise these opportunities the industry must start planning and preparing **now**. To support this, here is a Re-opening Checklist for Industry, which reflects the findings relevant to the industry from this current Consumer Sentiment Survey.

Product and Experience



Business Operations, Premises and Staff



Marketing Activity



Product and Experience



Assess your product(s) and experience(s) against the core motivators/needs of key Domestic market segments i.e. Aspiring Families and Natural Quality Seekers.

For further information visit [HERE](#)



Identify which elements have most appeal and consider how could you enhance their appeal?

Note the shift in motivations to travel in W4, **with relax and unwind now back as the number 1 factor** .

- Relax and unwind - stress release - is the primary motivator (63% up from 52% in W3 survey)
- **Need to escape/get away now number 2 factor** (now 54%, dropping from 58% in W3)
- **Enjoying food and drink** is still important to dial up in the communications strategy (33%)



Aligning your product/experience to appeal to the younger market will pay dividends.

Intentions to take short breaks is highest among 18-34 year olds (49%) & young/mid families (55%). Intentions to take longer breaks is also highest among 18-34 year olds (30%) & young/mid families (38%)

Business Operations, Premises and Staff



Apply for We're Good to Go (WGTG) quality mark **(there is a considerable rise in awareness of the mark (now 37%, up from 23%))**. The vast majority (96%) of those who were aware of the mark said it would give them confidence that a business is safe.

Update your T&Cs and cancellation policy. Maximum flexibility will secure booking i.e. free cancellation, flexible transfer of booking, flexible gift vouchers etc. **(60% - up from 52% - said they would only book if there were flexible booking arrangements for cancellations)**

Create/update your COVID Safe Policy and Risk Assessment to ensure it reflects any new guidelines issued by NI Executive or Statutory agencies between now and re-opening. Liaise with your local EHO, Tourism NI helpline or industry body for advice.

Schedule a staff training/re-opening session to update staff and include them in planning process (engaged, informed, welcoming staff will be critical to build customer confidence pre, during and after visit and help create a positive, welcoming visitor experience)

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

Marketing Activity

Prepare a **re-opening marketing plan which resonates with younger market who are showing a high propensity to take short breaks** (18-34 year olds 49% & young/mid families 55%) or longer breaks (18-34 year olds 30% and young/mid families 38%). **Digital platforms will be especially important for the younger target market .**

Develop messaging/content/high resolution images/videos etc. to appeal to each market segment. **Focus on messaging around relax and unwind**, with stress release the primary motivation to travel (63% up from 52% in W3 survey), followed by **escape and get away from it all**. **Safety reassurance and affordability and ease of taking a break in NI are all important in marketing communications**. Imagery depicting, green, open spaces, walking, hiking and outdoor activity will resonate across all target markets.

Support local messaging will resonate with people as **64% will make a conscious effort to support local tourism sector when things start to re-open**.



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 (**69% said they would be more inclined to visit a tourism/hospitality business that has the WGTG mark**).



Marketing Activity (continued)

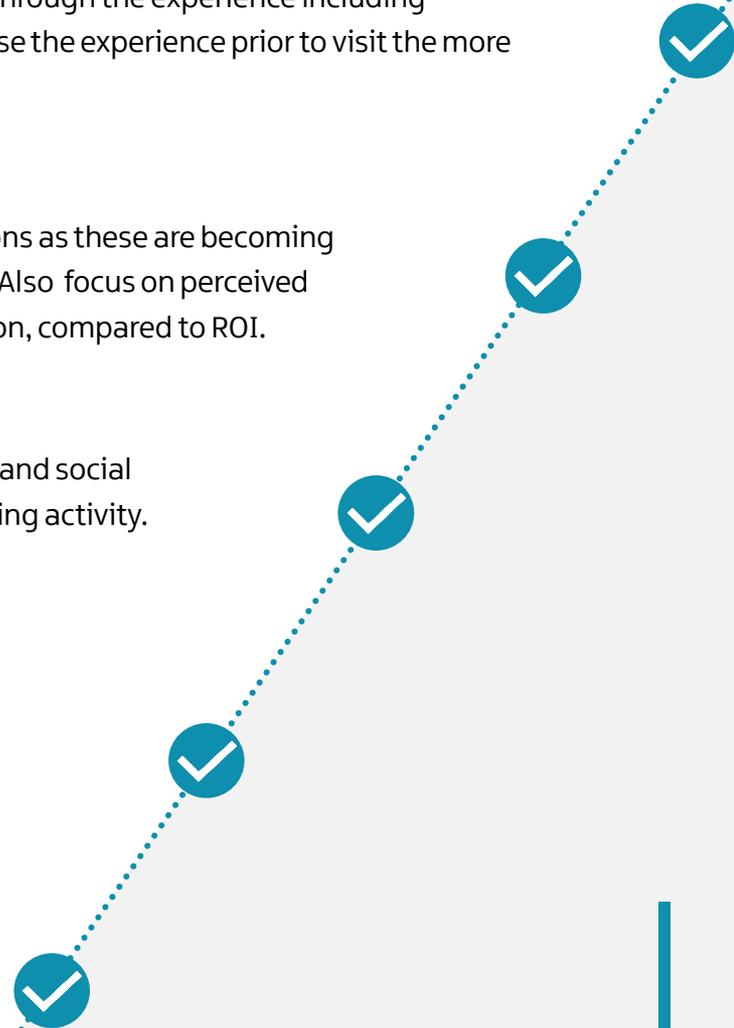
Consider the use of blogs/vlogs/video diaries to take customer through the experience including arrival and safety procedures. The more the customer can visualise the experience prior to visit the more confident they will be about booking.

Focus on environmental and sustainability efforts or accreditations as these are becoming increasingly important factors in choosing holiday destinations. Also focus on perceived value for money (VFM) of Northern Ireland as a holiday destination, compared to ROI.

Engage with Tourism NI and Local Council Marketing campaigns and social media platforms to drive and increase reach of individual marketing activity.
“Travel when safe to do so” is key message.

Add testimonials and a customer feedback function to your website and link with other platforms i.e. Trip Advisor

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





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

Click [HERE](#) to view full Wave 4 Consumer Sentiment Survey results.