



Consumer Sentiment Research

ROI Market – Takeaways for Industry

Wave 4 Survey • 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 Republic of Ireland (ROI) population to assess the evolving 'consumer mood' towards Covid-19 and prevailing attitudes/motivators to travel. The research reflects the balance of our key ROI market segments.

The fourth wave of the survey reflects the **increase in consumer confidence**, and further enforces the optimistic mood towards travel to NI which was evident in Wave 3 of the research, as a result of the success of the vaccine rollout in NI. The 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.

Only 17% of those surveyed think the Covid-19 situation will get worse (young families have a more negative outlook at 27%). **A more positive outlook, in terms of believing the worst has now passed, was evident** among the over 65s (45%), Open Minded Explorers (43%) and males (41%). Anxiety levels are similar to pre-Christmas levels, with getting sick with Covid-19 and lockdown fatigue now the biggest drivers of anxiety/concern in ROI.

Of those surveyed:



41%
Open to Ideas



33%
Open Minded Explorers



25%
Active Maximisers

Link to full survey results [HERE](#)

Introduction

Wave 4 findings further underline increased optimism. **37% of those surveyed stated they were open to exploring ideas right now for a holiday to NI this year, (up from 28%)**. The younger market (25-34 year olds) is more open to exploring ideas for an NI holiday (50%), with a large rise in the Active Maximisers segment (up from 36% to 46%) and increases for Open to Ideas (up from 33% to 37%). That said, the **younger market has demonstrated the strongest desire to travel abroad**. Almost three-quarter (74%) of respondents expect the cost of international travel to increase post-Covid, presenting an opportunity for marketing to **highlight the value for money aspect of a holiday to NI**.

This survey also delved deeper into understanding the travel motivations and perceptions of ROI visitors to NI. Of those who had visited NI since the pandemic began, **57% were visiting for the first time for leisure**. The key words to describe NI were fun, friendly, nice and safe.

There is still more work to be done to decrease consumer perceptions around safety (**Covid-19 safety concerns are still the top reason for not visiting NI**, but there is a clear indication that consumer confidence is increasing).

Of those surveyed:

Confidence that a holiday on the island of Ireland could happen in:

September

60%

October

66%

November

68%

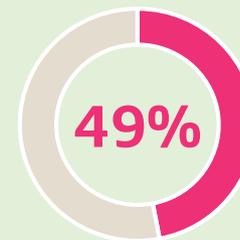
Propensity to travel to NI & ROI

10%

intend to take a break to **NI**

57%

intend to take a staycation in **ROI**



Of those intending to take a short break in NI have still not booked anything

Link to full survey results [HERE](#)

Checklist for Industry

For businesses in NI, the ROI market will continue to offer opportunities and a good return. It will be a highly competitive market, competing with the desire to staycation in their own country and the ease of travel to GB and other European destinations, therefore the industry must start planning and preparing **now**.

To support this, here is a **Re-opening Checklist for Industry wishing to target the ROI Market**, reflecting the 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 of key ROI market segments. For further information visit [HERE](#) to 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 W4 in your assessment (longer/short breaks combined). **9 percentage point increase** in those who said they **were open to exploring ideas about a holiday to NI**.

Relax and unwind is now back to being the primary motivator (58% up from 42% in W3). Need to escape/get away now number 2 factor (now 54% up from 44% in W3).

22% expressed a desire to go somewhere they were familiar with (up from 13%). This is more prevalent in the ROI than the NI survey.

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.

To **enjoy great food and drink** has risen again from W3 (up from 31% W3 to 33% in W4).



Business Operations, Premises and Staff



Update your T&Cs and cancellation policy. Maximum flexibility will secure booking i.e. free cancellation, flexible transfer of booking, flexible gift vouchers etc (71% said they would only book a holiday in island of Ireland this year if there were flexible booking arrangements. This is much higher than the NI market at 60%).



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).



Apply for We're Good to Go Quality (WGTG) Mark.

Marketing Activity

Develop messaging/content/high resolution images/videos etc. to appeal to each market segment. Focus on messaging around relax and unwind and escape and get away from it all (**relax and unwind was top of their motivations to travel**), safety reassurance and affordability and ease of taking a break in NI.

Highlighting food and drink experience in NI will likely excite the most and should be prominent in imagery, with an emphasis on local produce etc.

Sustainability is going to have a larger impact on where tourists decide to go. 68% said they would be more likely to avoid tourism destinations where overcrowding from excessive tourism impacts negatively on local communities and 47% said they would choose tourism attractions/tourism businesses with sustainable/eco-friendly credentials.



Marketing Activity (similar to last survey)

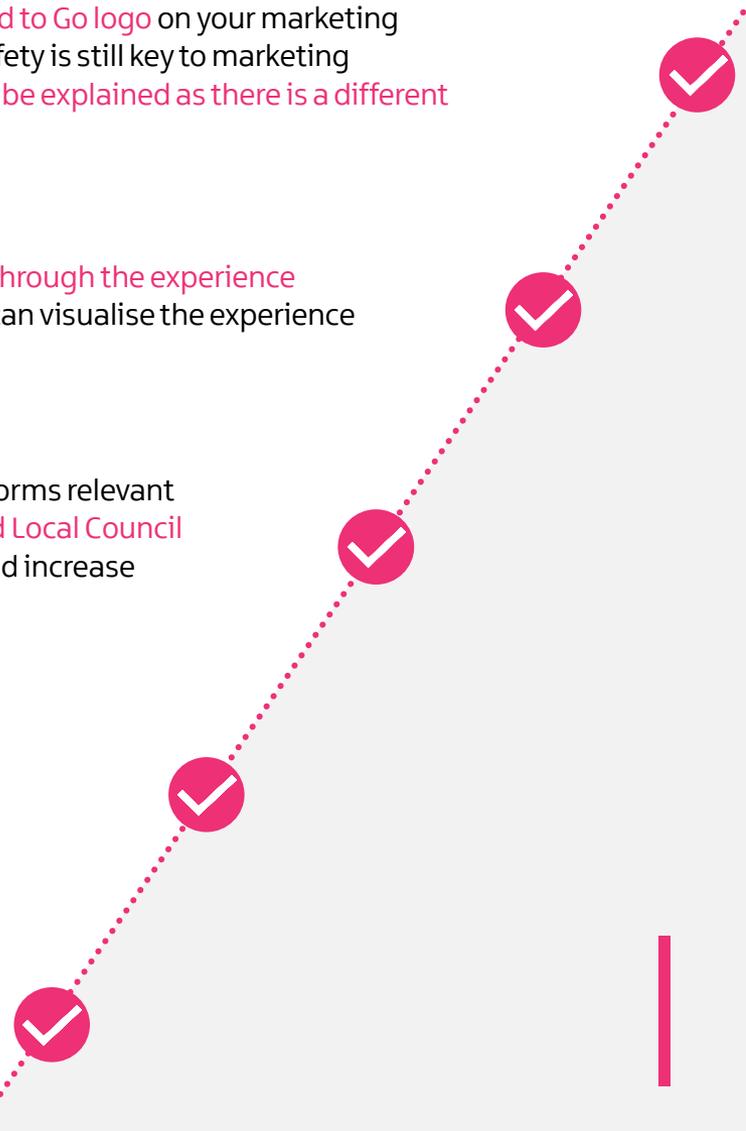
Clearly display a link to your Covid Safe Policy and your We're Good to Go logo on your marketing material including your booking platform and social media as safety is still key to marketing communications. Remember the WGTG quality mark will have to be explained as there is a different equivalent marque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

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.

Prepare a Re-opening Digital Media plan for each of the key platforms relevant to your target market segments and engage with Tourism NI and Local Council ROI Marketing campaigns and social media platforms to drive and increase reach of individual marketing activity.

Actively target those who made bookings but did not reschedule (the W3 research highlighted only 1 in 8 of those with bookings in 2020 did not 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 April 2021 by the Tourism NI Insights and Intelligence Service.

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

