



Consumer Sentiment Research

NI Market – Takeaways for Industry

Wave 3 Survey • February 2021

Introduction

The third wave (W3) of the **Consumer Sentiment Research** (carried out 2-15 Feb 2021), surveyed a representative sample of the NI population to assess the evolving 'consumer mood' towards Covid-19 and prevailing attitudes/motivators to travel within NI. The research also reflects the balance of our key Domestic Market Segments.

This survey, despite being administered during a time of great uncertainty, showed a discernible shift in perceptions from previous waves, with a more optimistic mood towards travel, as a result of the vaccine rollout and reduction in case numbers. It clearly demonstrates that key market segments are **'now actively'** planning and starting to book their staycations (particularly in the Aspiring Families segment, where **59% of those surveyed** stated they were open to ideas right now for a holiday in NI, and **51% were going to do more staycations this year**).

The research also revealed that potential NI visitors are **planning breaks for late spring (30% in May), peaking in August (44%)**. There is a higher propensity to book longer breaks towards end of summer (**31% in August**) and autumn 2021. This wave of the research shows a positive increase from previous waves, indicating that confidence is returning. This should show a further increase in the months ahead.

Of those surveyed:



39%
Aspiring Families



38%
Natural Quality Seekers



23%
Social Instagrammers

[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, how could you enhance their appeal?

Note the shift in motivations to travel in W3 in your assessment:

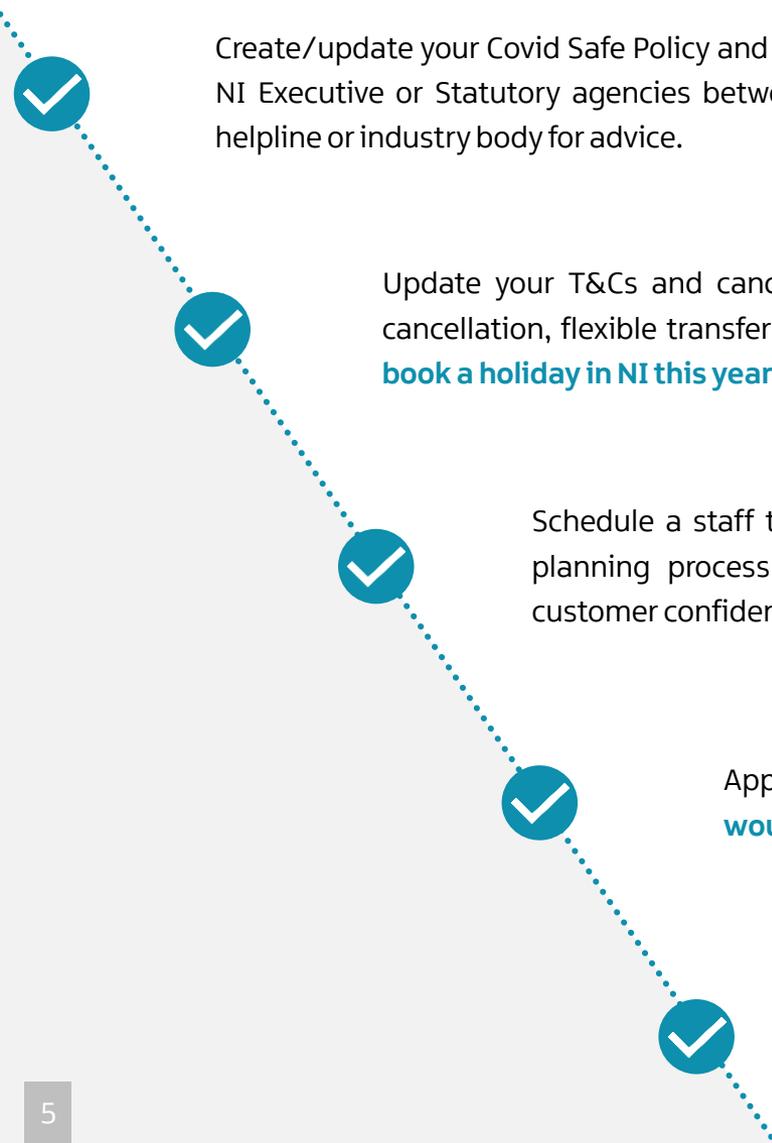
- Need to escape/get away, stress release is now primary motivator **(58% up from 46% in W2 survey)**
- Relax and unwind now number 2 factor **(now 52%, dropping from 63% in W1)**
- Enjoying great food and drink has risen **(up from 29% W2 to 34% in W3)**



Visitors are also looking for Exclusive Packages - this is the No.2 factor behind option to cancel **(51%)** which would encourage booking sooner **(41% of those surveyed)**.

What other attractions, experiences, local services i.e. spa, well-being, local guides could you work with to deliver this to both Aspiring Families and Natural Quality Seekers?

Business Operations, Premises and Staff



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.

Update your T&Cs and cancellation policy. Maximum flexibility will secure booking i.e. free cancellation, flexible transfer of booking, flexible gift vouchers etc **(52% said they would only book a holiday in NI this year if there were flexible booking arrangements)**.

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).

Apply for We're Good to Go Quality (WGTG) Mark **(2 out of 3 say they would choose an accredited business over a non-accredited one)**.

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

Marketing Activity

Engage with Tourism NI and Local Council Marketing campaigns and social media platforms to drive and increase reach of individual marketing activity.

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.

Develop messaging/content/high resolution images/videos etc. to appeal to each market segment. Focus on messaging around escapism (**58% said to escape and get away from it all was top of their motivations to travel**), safety reassurance and affordability and ease of taking a break in NI.

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 (**9 in 10 of those surveyed said WGTG gave them confidence that the business was safe**).



Marketing Activity (continued)

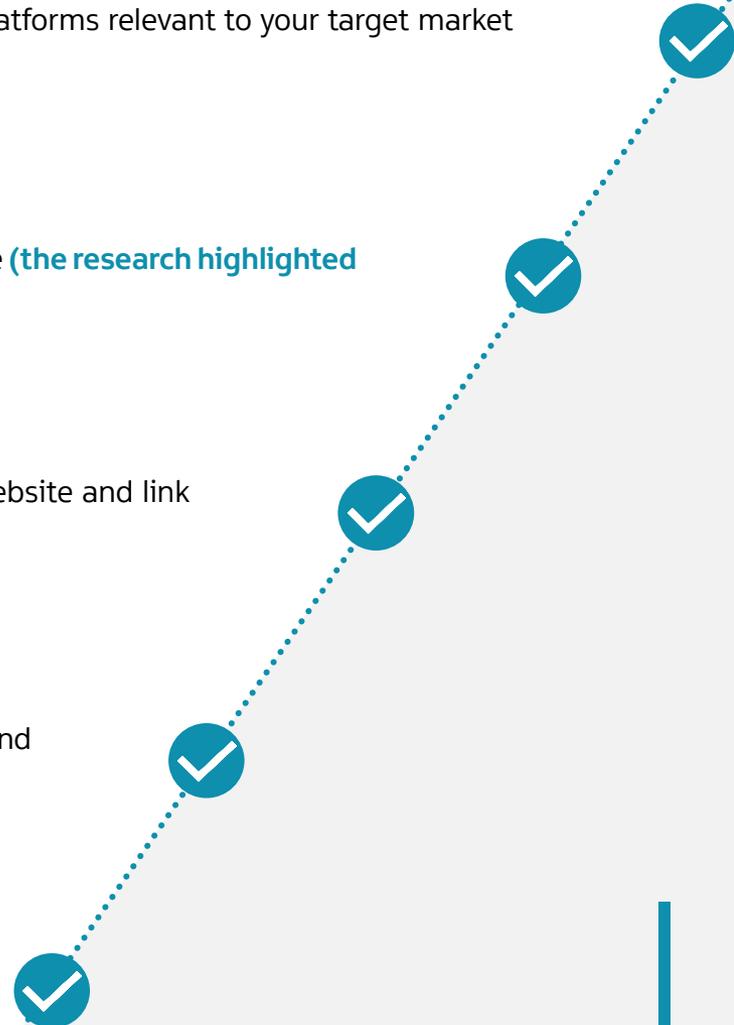
Prepare a Re-opening Digital Media plan for each of the key platforms relevant to your target market segments.

Actively target those who made bookings but did not reschedule **(the research highlighted 31% of those with bookings in 2020 did not reschedule)**.

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

Add a FAQ section to website to deal with common concerns and queries.

Add T&Cs and cancellation policy to booking platform **(51% said this would encourage them to book sooner)**.





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

Click [HERE](#) to view full Wave 3 Consumer Sentiment Survey results.