



Consumer Sentiment Research

ROI 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 Republic of Ireland (ROI) population to assess the evolving 'consumer mood' towards Covid-19 and prevailing attitudes/motivators to travel to NI from ROI.

This survey was administered during a time of great uncertainty. This wave of research in ROI clearly shows a discernible shift in perceptions from previous waves, with a more optimistic mood towards travel, similar to the NI Market.

Of those surveyed:



43%
Open to Ideas



32%
Open Minded Explorers



25%
Active Maximisers

Link to full survey results [HERE](#)

Introduction (continued)

It clearly demonstrates that optimism is returning, and key market segments are *now actively* planning and starting to book where **58% of those surveyed** stated they were open to ideas right now for a holiday in ROI this year and **49% are going to do more staycations this year**). Notably, on average, only **28% said they were they were open to exploring ideas right now about a holiday to NI this year**. The younger market is most likely to travel to NI, especially around Dublin. This was much higher in the younger age groups (**36% of Active Maximisers, 33% Open to ideas, rising even higher for those in these segments with mid families 45%**). Marketing emphasising the proximity of Dublin to NI could be particularly effective.

The research also revealed that potential ROI visitors not as enthusiastic about **planning breaks as their counterparts in NI, only 26% are currently planning to take a break mid-summer (compared to 44% in NI)**. There is a higher propensity to book longer breaks earlier in summer (**32% in June and July**). This wave of the research shows a slight dip in intentions to travel to NI from previous waves, indicating that while confidence is returning businesses will have to work particularly hard now to attract the ROI market. Like NI there is more confidence and optimism, tempered by safety concerns. The ROI is showing increased propensity to staycation at home. **Only 4% of those surveyed said that NI would be the first place they would visit when they are vaccinated and restrictions are lifted. ROI will be the first place 15% of residents of NI will visit.**

Of those surveyed:



58%

Open to exploring ideas right now for a holiday in ROI this year



49%

Are going to do more staycations this year



28%

Open to exploring ideas right now for a holiday in NI this year

Checklist for Industry

For businesses in NI, the ROI market will continue to offer opportunities and a good return – with a higher propensity to book overnight stays and packages of activities and experiences. 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 i.e. **Open to Ideas, Open Minded Explorers and Active Maximisers.**

For further information visit [HERE](#)

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

Need to escape/get away, stress release is now primary motivator **(44% up from 27% in W2 survey).**

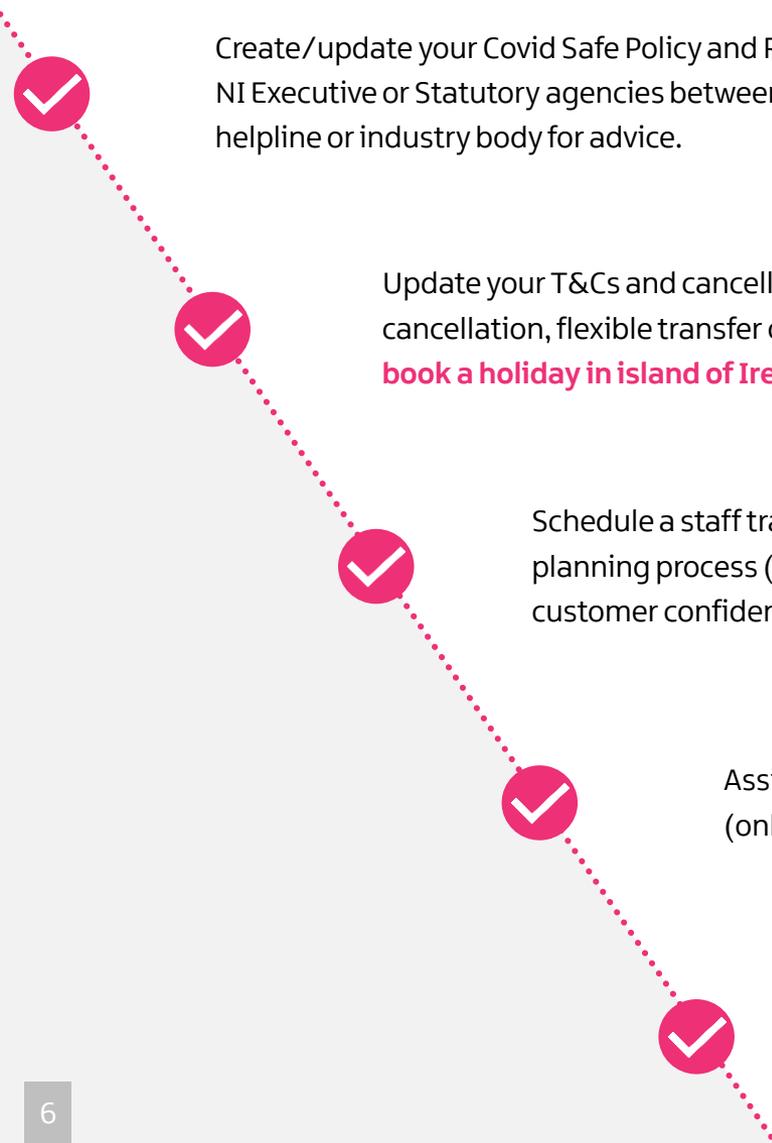
Relax and unwind now number 2 factor **(now 42%, dropping from 57% in W1)**
To have fun has risen significantly **(up from 27% W1 to 36% in W3), perhaps reflecting the younger age group.**

Visitors are also looking for **Exclusive Packages (38%)** - it is almost as important as the option to cancel **(39%)**. These are the top two factors which would encourage booking sooner. What other attractions, experiences, local services i.e. spa, well-being, local guides could you work with to deliver this to the three key market segments?

Identify which elements have most appeal, how could you enhance their appeal and make the experience more compelling?



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. **(67% said they would only book a holiday in island of Ireland 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).

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

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. **(39% of those surveyed said they would feel safe to travel to NI this summer. This was even more pronounced amongst mid families 63% and the younger 25-34 age group 57%).** Remember the WGTG quality mark will have to be explained as there is a different equivalent mark in ROI.

Develop messaging/content/high resolution images/videos etc. to appeal to each market segment. Focus on messaging around escapism **(44% 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.

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.

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



Marketing Activity (continued)

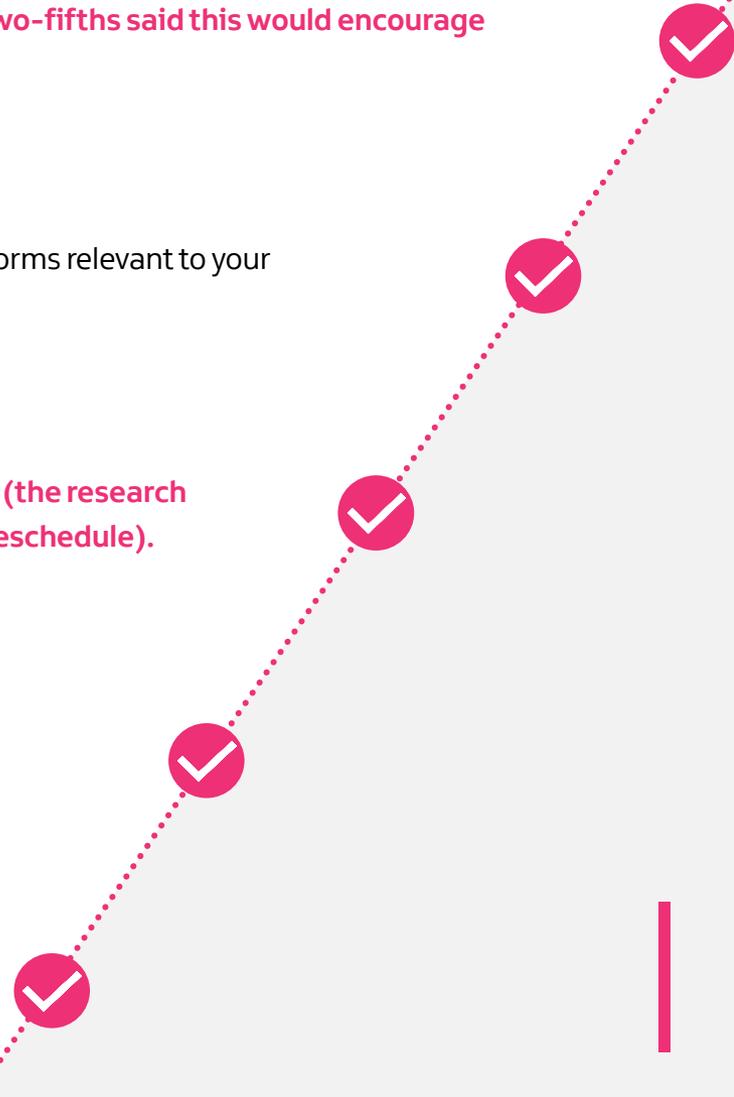
Add T&Cs and cancellation policy to booking platform **(almost two-fifths said this would encourage them to book sooner)**.

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 only 1 in 8 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.





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

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

