



Consumer Sentiment Research

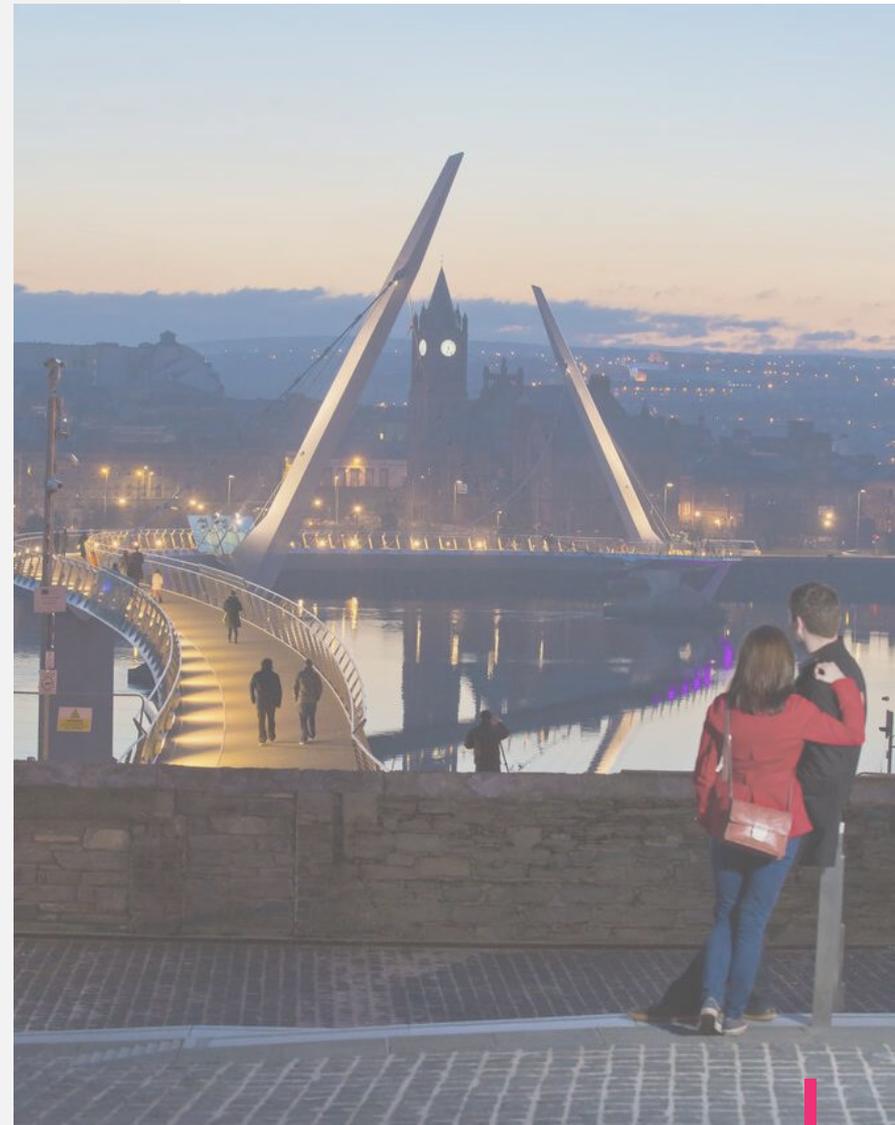
ROI Market – Takeaways for Industry

Wave 7 • March 2022

Introduction

The seventh wave (W7) of the Consumer Sentiment Research (carried out 4th to 16th February 2022), 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 Northern Ireland (NI) from ROI.

The research also reflects the balance of our key ROI market segments. Of those surveyed 55% were in the ABC1 social group and 45% were in the C2DE group. 27% of those surveyed were pre families, 13% were young families, 11% were middle families, 18% were older families and 31% were empty nesters/older/no kids.



Link to full survey results [HERE](#)

Summary

The seventh wave (W7) of the Consumer Sentiment Research is the **most optimistic to date**. The survey took place just a few weeks after the Irish government removed most of its COVID-19 restrictions on 21st January and the NI Executive followed suit on 14th February.

Despite the number of COVID cases, the survey reflects **a real sense of optimism** as the vast majority (88%) of those surveyed now think things are going to stay the same or improve over the coming months. This new optimism translates into a **significant increase in consumer confidence**, and a **more optimistic mood towards travel**, with 73% thinking it would be safe to travel to NI this winter/spring (an increase of 28% from Wave 6) and 77% in summer (an increase of 24% from Wave 6).

Intentions to take a short break to NI are up by 6% and a longer break have risen by 3%. Also, for the first time, the survey highlighted a dramatic **increase in the sense of comfort with doing things indoors** (44% said they felt safe at a small indoor event, up 16% since the last wave. 37% said they would feel safe at a large indoor event, up 14%).

While this is certainly welcome news for the tourism industry in NI and bodes well for a positive performance from the important ROI market, consumer optimism has also resulted in **the re-emergence of plans to travel abroad in 2022**. With more opportunities to travel and more consumer choice available, it is even more important than ever that the tourism industry continue to re-assess and improve the offering.



Link to full survey results [HERE](#)

Wave 7 Survey – Key Points



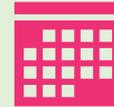
The survey reflects a real sense of optimism as the vast majority of those surveyed now think things are going to stay the same or improve over the coming months, translating into a significant increase in consumer confidence.



Travel confidence has increased significantly, with 64% being confident that they would be able to take a holiday on the Island of Ireland in March 2022 without it being cancelled, increasing again to 71% in April.



Refunds remain the key incentive to consider booking a break in NI but package offerings and accommodation discounts will also persuade people to book.



NI takes a slight hit to 'value for money' compared to previous waves but is still considerably ahead of GB and ROI.



16% have taken a short break or long trip to NI since December 2021 and of those, 52% were visiting for the first time.



Take note of the key drivers of choice highlighted in this survey – quality of food and range of activities being the most significant.

[Link to full survey results HERE](#)

Checklist for Industry

The following **Checklist for Industry wishing to target the ROI Market** reflects the key findings from this current Consumer Sentiment Survey.

Product and Experience



Business Operations, Premises and Staff



Marketing Activity



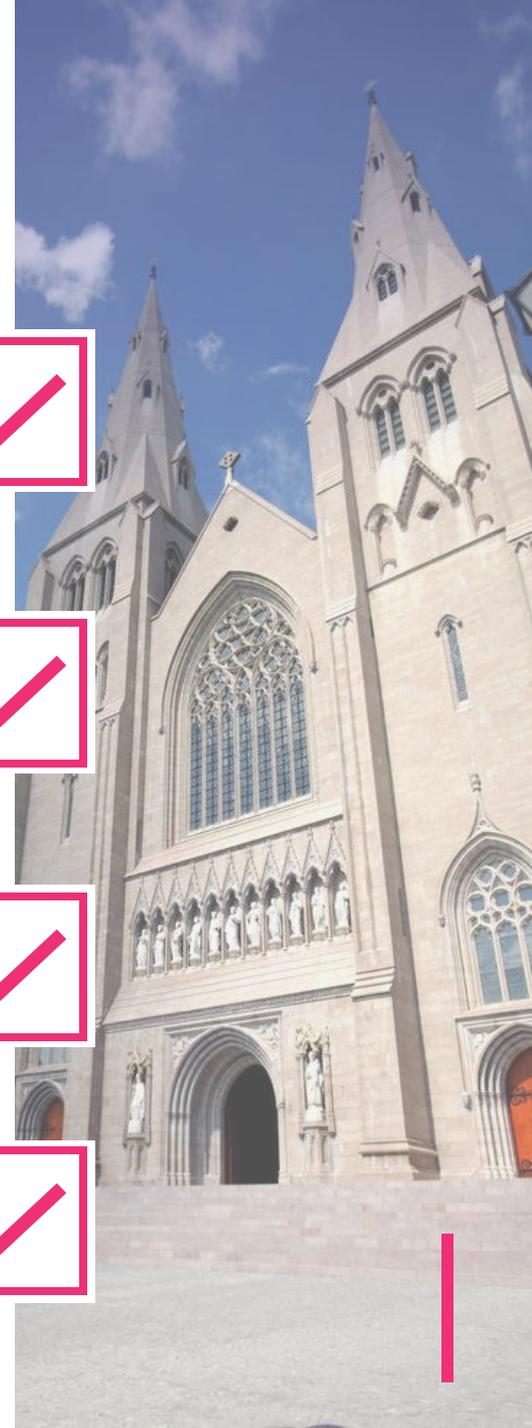
Product & Experience

Be aware of the shift in primary motivators when shaping your product and experience. Relax and unwind continues to be the primary motivator (50%, up from 41% in W6 survey). Having a fun break has increased from 32% in Wave 6 to 39% to be the number 2 motivation for taking a break in NI.

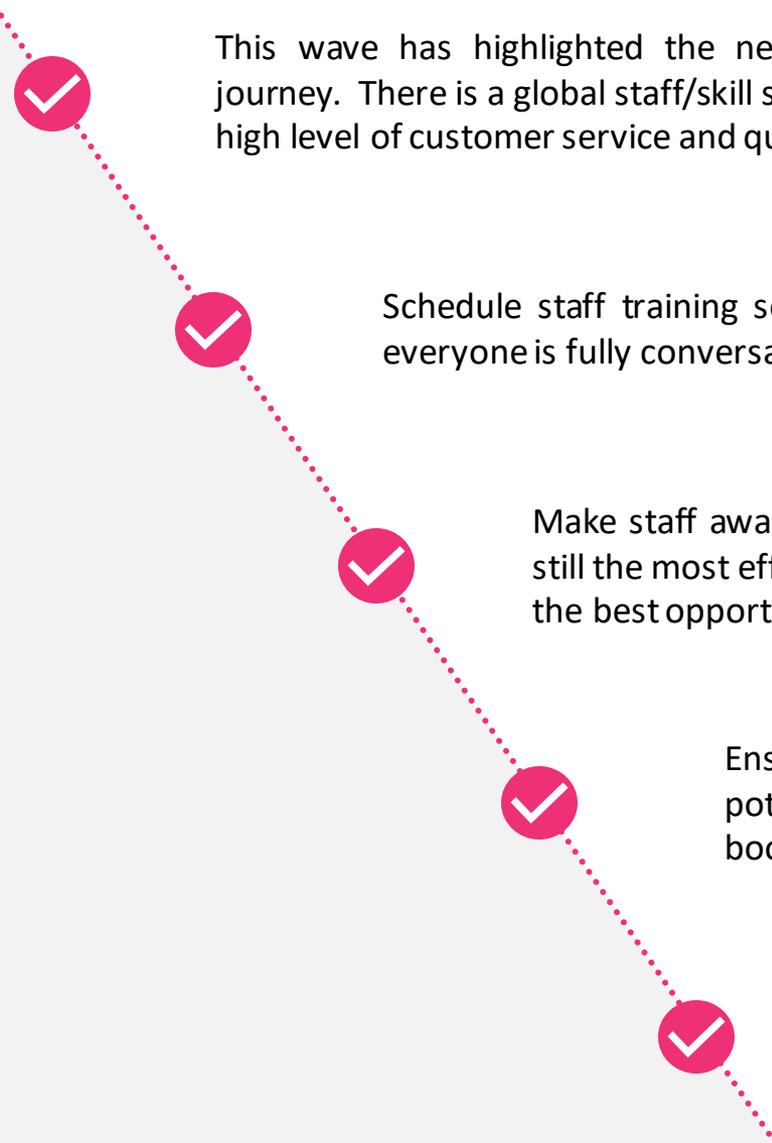
Consecutive waves of the survey have now highlighted that our competitive positioning as a visitor destination is focused on the quality and range of offer. Quality of food and drink and range of activities are the top 2 rated aspects among those who have researched a trip and should be dialled up by the industry to further consolidate this competitive advantage.

Product and experience planning can now focus on bringing back indoor activities to complement the outdoor activities, which had been the focus in 2021, resulting in the most significant shift to normal trading activity since the start of the pandemic.

The increased confidence in activities such as bus tours means that the NI industry can, at last, start to shape their product and experience to cater for this lucrative market from ROI again.



Business Operations, Premises and Staff



This wave has highlighted the need for consistency of service right through the customer journey. There is a global staff/skill shortage, but it is vital to train and motivate staff to maintain a high level of customer service and quality standards.

Schedule staff training sessions to update staff and include new recruits to ensure everyone is fully conversant with updated COVID-19 Safety policies and guidelines.

Make staff aware of nearby attractions, experiences and events as they are still the most effective advocates for your business and locality and represent the best opportunity to increase visitor spend and dwell time.

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

The significant changes to the product and experience offer, brought about by increased consumer confidence and greater propensity to travel, highlight the need to urgently re-focus all marketing activity, particularly digital messaging.

Ease with engaging in indoor activities have increased significantly, especially restaurants / cafes where 60% now feel at ease. This is also reflected in the activities visitors from ROI would be interested in doing with restaurants (55%) and pubs/bars (36%) now high up the list.

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.

It is still important to focus messages around relaxing and unwinding and having fun (50% said to relax and unwind was one of their top motivations to travel with having fun rising to second place, scoring 39% in this wave).

Short timeframes between booking and travel will call for fast, responsive marketing techniques. Three quarters of short breaks booked by ROI travellers on the Island of Ireland are booked less than 2 months from the date of travel.



Marketing Activity (similar to last survey)

Continually 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 <https://tourismni.com/Grow-Your-Business/know-your-customer/markets-and-segments/ROI-Market/>.

Clearly display a link to your COVID-19 Safe Policy on your marketing material, booking platforms and social media. Also ensure the EAGS brand logo and hashtags feature highly in your messaging and visitor communications.

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.

Add T&Cs and cancellation policy to booking platform as well as a FAQ section and customer feedback function to your website.

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





Produced in March 2022 by Tourism NI's Insights and Intelligence Service.

Click [HERE](#) to view full Wave 7 Consumer Sentiment results.