Consumer Sentiment Research

NI Market – Takeaways for Industry

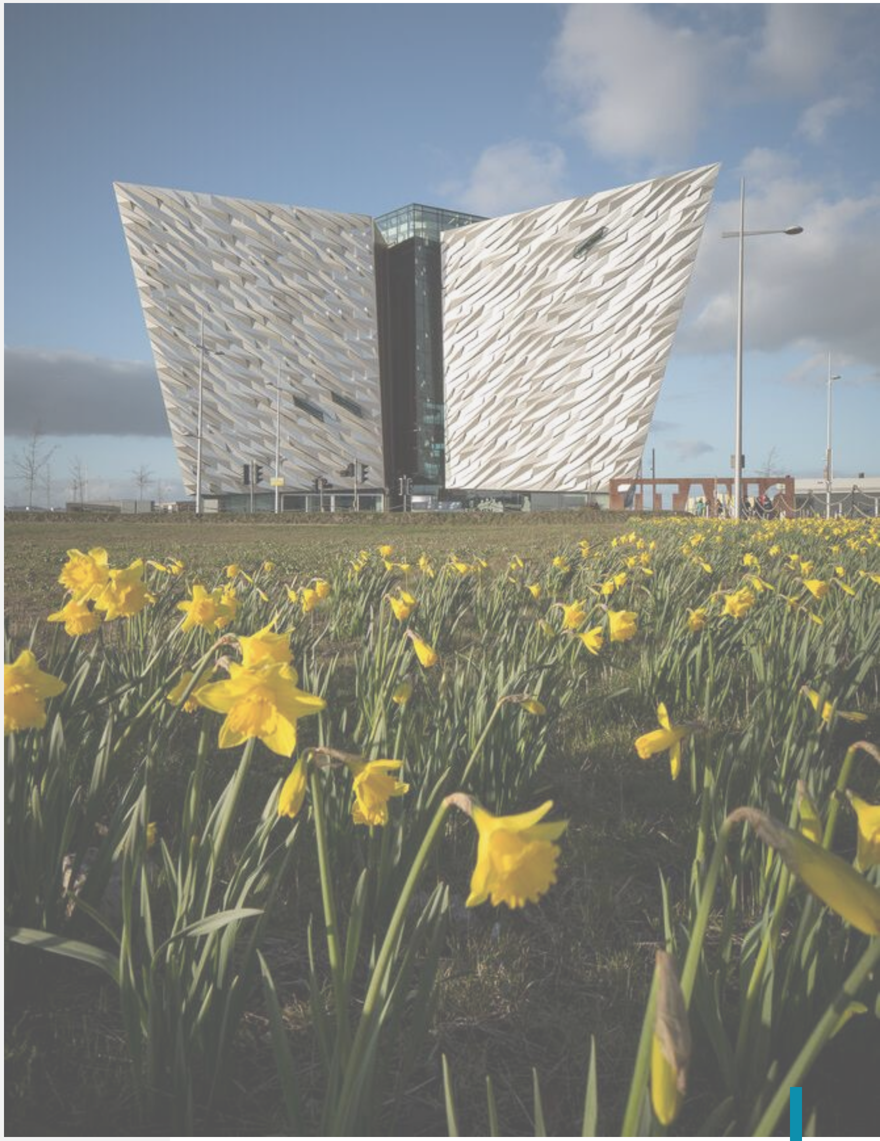
Wave 7 • March 2022

Introduction

The seventh wave (W7) of the Consumer Sentiment Research (carried out 4th to 23rd February 2022), surveyed a representative sample of the Northern Ireland (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. Of those surveyed 47% were social group ABC1 and 53% were social group C2DE. 20% of those surveyed were pre family, 9% young family, 11% middle family, 19% older family and 41% empty nesters/older/no kids.

This survey took place as NI announced an easing of COVID-19 restrictions on 14th February. The Republic of Ireland (ROI) opened up slightly ahead of NI, which was reflected in increased levels of consumer confidence and intention to travel in this competitor market. We would expect NI to follow this pattern, as opening up across the Island of Ireland levels out.



Link to full survey results HERE

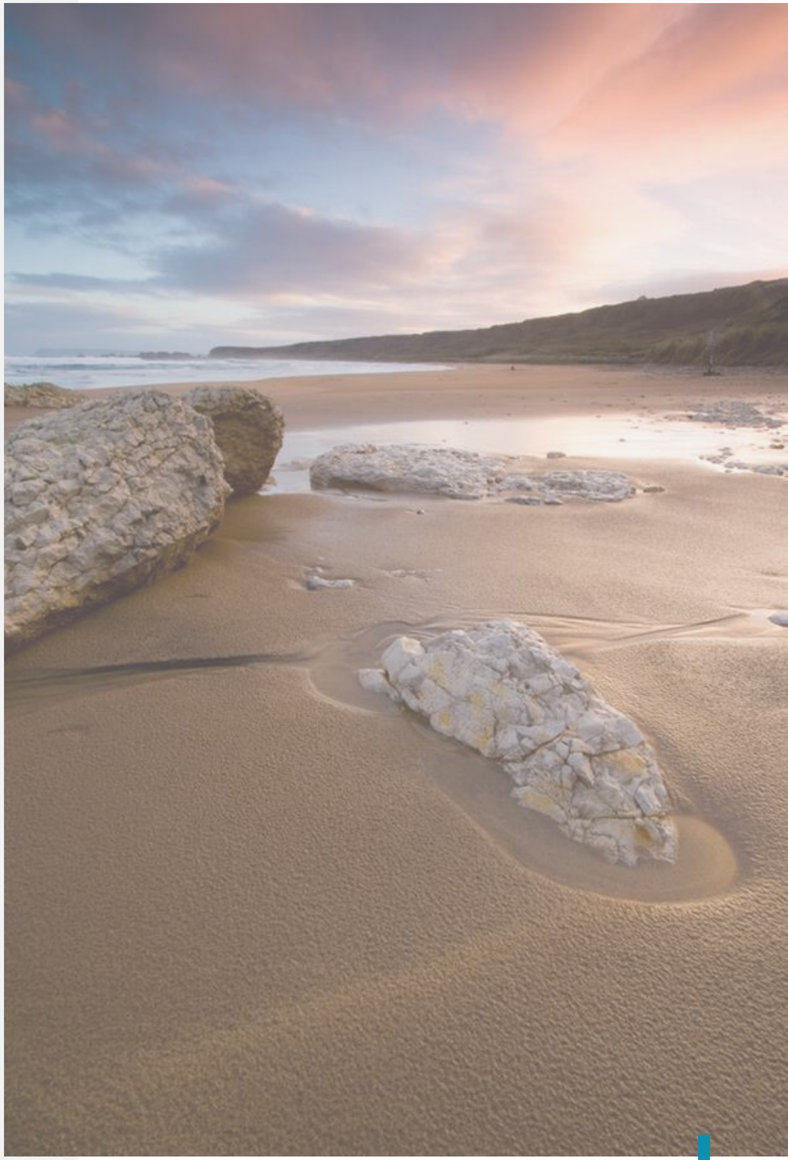
Summary

The seventh wave (W7) of the Consumer Sentiment Research is the **most optimistic to date**.

Although still early days and with the number of cases remaining high in NI as a result of the new Omicron variant, findings reflect a **real sense of optimism** as the vast majority (87%) 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**. Nearly half of those surveyed (49%) think that the worst has passed (compared to 18% in Wave 6) with a more positive outlook among over 55s (54%) and pre-family (58%).

There is a much more **optimistic mood towards travel since the last wave**, with 82% thinking it would be safe to holiday within NI this winter/spring (an increase of 11% from Wave 6) and 82% thinking it would be safe to holiday in NI in summer (an increase of 7% from Wave 6).

This wave of the survey highlighted a shift in the **sense of comfort with indoor activities/events.** 34% said they felt safe at a small indoor event and 32% at a large indoor event (compared to only 22% happy to attend indoor events of any type in Wave 6). 52% said they were happy to eat at restaurants/cafes, although there is still some reticence to going to pubs/bars, with only 35% feeling safe in this environment.



Link to full survey results HERE

Summary

While this is positive news for the tourism industry in NI and bodes well for another strong “staycation” market in 2022, it is certainly not time for complacency when developing product offer and planning marketing and communications. The **rise in consumer optimism has resulted in the re-emergence of plans to travel abroad in 2022**, with 25% indicating that they plan to travel abroad in the next 3-4 months.

Summer 2022 will **undoubtedly be a very competitive** trading environment for the NI tourism industry. Keeping a close eye on consumer trends and market intelligence such as this Consumer Sentiment Research will be critical to success.

Safety perceptions of NI (in terms of not catching COVID) **have increased,** with 82% of those surveyed stating that they considered it safe to go on holiday in NI this winter/spring (an increase of 11% from Wave 6) and **82% think it would be safe to go on holiday in NI in the summer**.

The research also revealed that **confidence that holidays on the Island of Ireland won’t be cancelled, has also increased** with 58% being confident that they would be able to go on a break on the Island of Ireland in March 2022 without any cancellations (compared to 36% in Wave 6), rising to 66% confidence in April 2022 and 71% in May 2022.

Link to full survey results HERE

Wave 7 Survey – Key Points

The option to cancel with full refund is still the key incentive to increase consideration of NI followed by accommodation discounts.

NI's value for money perception has dropped slightly but continues to be strong compared to competitors (still second only to Spain and considerably above GB and ROI) and this must continue to be leveraged in marketing communications.

23% have taken a short break or long trip in NI since December 2021 however, 57% did not travel at all and we can expect this to create pent-up demand.

NI travel intentions remain positive compared to the last wave. 44% are considering taking a day trip within NI in the next 3 to 4 months. 34% are considering a short break and 18% are considering a longer break in the next 3 to 4 months.

Of those who have researched a trip to NI, the most positively rated aspects were the general range/ choice of things to see & do and the quality and choice of places to eat and drink.

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 offer.

Link to full survey results HERE

Checklist for Industry

The following **Checklist for Industry wishing to target the NI Market**, reflects the key findings from this current wave of Consumer Sentiment Research.

Product and Experience ☑

Business Operations, Premises and Staff ☑

Marketing Activity ☑

Product & Experience

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.

Also be aware of the shift in primary motivators when shaping your product and experience. To 'relax and unwind' continues to be the primary motivator (48%; down from 56% in W6 survey) followed by the desire to escape/ get away (now 38%, down from 50% in W6).

Continuing to align your product/ experience to appeal to the younger market will pay dividends. Young families are most likely to be express intent to take a short break in NI in the next 3-4 months (49%). They prize fuss-free booking; 40% want to get the booking process out of the way as quickly as possible.

The increase in travel confidence and the improved perceptions of safety among NI residents, particularly with regards to indoor activities means that the industry needs to review the product and experience to ensure consumers' increasing demands are met, taking note of the core motivators and different needs of the key market segments (Aspiring Families, Natural Quality Seekers and Social Instagrammers).

Business Operations, Premises and Staff

- 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.

- 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 use best endeavours to train and motivate staff to maintain a high level of customer service and quality standards.

- Update your COVID-19 Safe Policy and Risk Assessment to ensure it reflects the relaxing of restrictions and updated guidelines issued by NI Executive or Statutory agencies. Liaise with your local EHO, Tourism NI or industry body for advice.

- 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 increased competition to NI's product and experience offer, brought about by growing consumer confidence and greater propensity to travel, highlight the need to urgently re-focus all marketing activity, particularly digital messaging.

Short timeframes between booking and travel will call for fast, responsive marketing techniques. Almost three quarters of short breaks on the Island of Ireland are booked within two months of the date of travel, with around half of long breaks on the island of Ireland booked within the same time period.

Note the shift in visitors' sense of comfort with engaging in indoor activities, especially restaurants/ cafes, and growing comfort with indoor events and shape your marketing and communications sensitively to reflect this.

Prepare a marketing plan which resonates with the younger market who are showing a high propensity to take short breaks (49% of young families express intent to take a short break in NI in the next 3-4 months). Digital platforms will be especially important communication and marketing channels for the younger target market.

Marketing Activity (similar to last survey)

Continuously 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 and increased interest from Social Instagrammers. For further information visit https://tourismni.com/Grow-Your-Business/know-your-customer/markets-and-segments/ni-markets/

Clearly display a link to your COVID-19 Safe Policy on your marketing material. Engage with Tourism NI and Local Council Spring Marketing campaigns and social media platforms targeting the domestic market to drive and increase reach of individual marketing activity.

Support local messaging and sustainability/good environmental credentials are still important messages to promote. Also focus on perceived Value for Money (VFM) of NI as a holiday destination, compared to ROI.

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

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

Click HERE to view full Wave 7 Consumer Sentiment results.