

Consumer Sentiment Research

NI Market – Takeaways for Industry

Wave 5 Report • September 2021

Introduction

The fifth wave (W5) of TNI's Consumer Sentiment Research (carried out 12th August – 27th August 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 market segments. Of those surveyed 23% were pre family, 8% young family, 12% middle family, 18% older family and 39% empty nesters/older/no kids.

This survey took place as the NI Executive agreed to relax self - isolation rules. The last few days of the survey coincided with news reports that NI had the highest death rate, highest infection rate and lowest vaccination rate in the UK, which is starting to have an impact on consumer sentiment.

Consumer confidence has decreased since the last wave of the survey. There has been an increase in the number who think the COVID-19 situation will get worse (29% compared to 21% at the last wave). There is a more negative outlook among 35-54 year olds (36%) and mid/older families (35%).

Of those surveyed:



23% were pre-families

8% were young families

12% were middle families

18% were older families

39% were empty nesters/older/no kids

Link to full survey results [HERE](#)

Introduction

Anxiety levels have remained relatively stable, with almost 4 in 10 most likely to report being anxious frequently/ all of the time.

The spike in COVID 19 cases has weakened safety perceptions. Although 70% of those surveyed stated they considered it safe to go on holiday in NI this summer this has decreased by 7% since April's survey. 72% think it would be safe to go on holiday in NI in the Autumn/Winter (down 11 percentage points from the last wave).

These findings reinforce the continued importance of cautious, COVID-secure messaging by the NI tourism industry.

The research also revealed that 51% are confident that they would be able to go on a break in September without any cancellations, rising to 56% confidence in October 2021.

In general, the number of those who feel at ease in engaging with various activities this summer decreased, likely reflecting the growing unease at the COVID situation. Most feel at ease in engaging with outdoor activities this summer but indoor events (54%), pubs/bars (49%) and public transport/bus tours (47%) have the highest levels of concern.



[Link to full survey results HERE](#)

Travel Motivations & Perceptions

One quarter (26%) took a trip in NI in 2021. 15% took a break in ROI and 11% went abroad. However, 58% did not travel at all and we can expect this to create pent-up demand.

Trip satisfaction among those who took a trip in NI was high, with 54% saying that their trip exceeded expectations and a further 42% saying that their expectations were met.

COVID Secure environment scored strongly among those who took a trip to NI with 81% rating this as good, which will help persuade those who are more nervous to travel within NI.

Of those considering a trip to NI in autumn/winter, 33% are considering a day trip, 27% a short break and 15% a longer break. Of those planning a short break 59% are actively planning and 22% have already booked. Of those planning a longer break 60% are actively planning and 18% have already booked.



More people aware of the **We're Good to Go** mark now (50% compared to 37% in April).



26% of NI consumers surveyed **took a trip in NI in 2021.**



NI's value for money perception continues to be strong compared to competitors and this must continue to be leveraged on in marketing communications.



There are many considering taking a break within NI this autumn/winter with **33% considering a day trip, 27% a short break and 15% a longer break.**



Of those planning a short break **59% are actively planning and 22% have already booked.** Of those planning a longer break **60% are actively planning and 18% have already booked.**

[Link to full survey results HERE](#)

Product & Experience

Aligning your product/experience to appeal to the younger market will pay dividends. Intention to take short breaks is highest amongst Social Instagrammers (37%) & Aspiring Families (32%). Intention to take long breaks is also highest amongst: Social Instagrammers (22%) & Aspiring Families (22%).

Review the key motivators to travel highlighted in this survey and shape your products/experiences to reflect these:

- Relax and unwind, stress release is still the primary motivator (59% down from 63% in W4 survey)
- Need to escape/get away now number 2 factor (now 48%, dropping from 54% in W4)
- Accessing great food and drink is now very important motivator for domestic market visitors, therefore it vital to dial this up in the communications strategy (40%, increase from 31% in W4).

Highlighting the local food and drink offer and related experiences will continue to differentiate NI in a very competitive market.

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 [TourismNI.com](https://www.tourismni.com).



Industry Takeaways

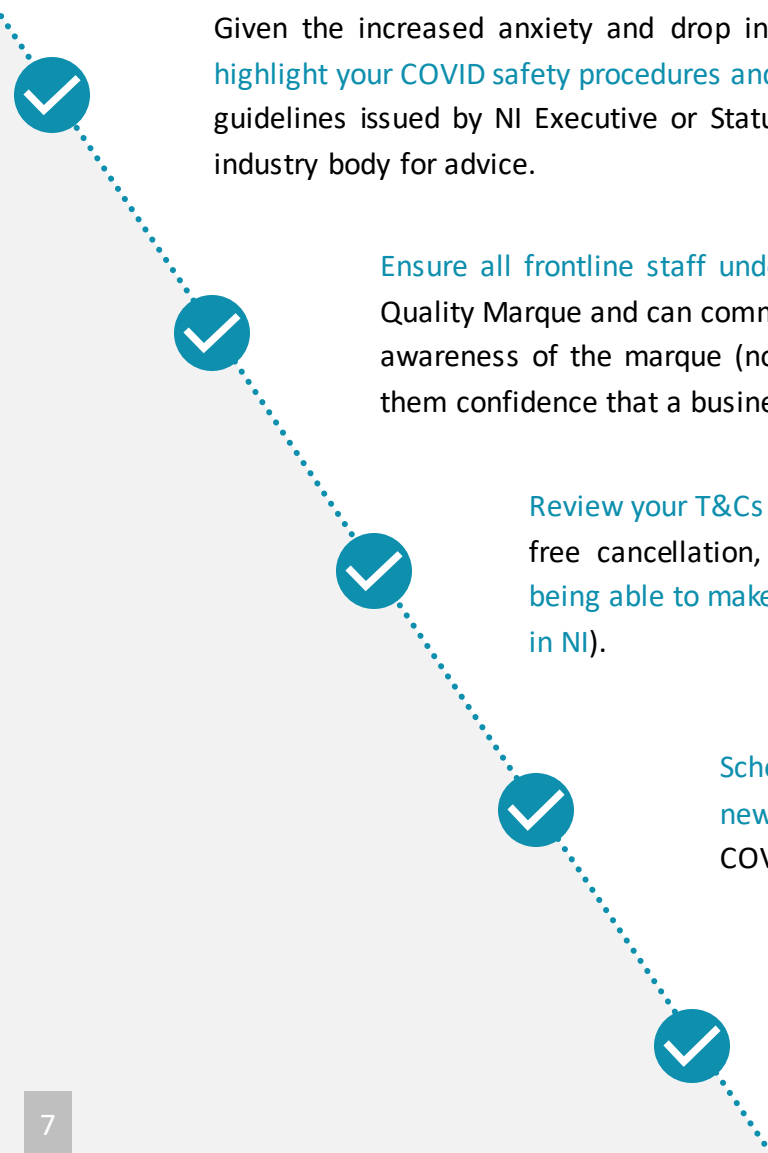
The following pages highlight the key takeaways for Industry wishing to target the NI Market, reflecting the findings from this current Consumer Sentiment Survey. They are broken down into the following categories:

Product and Experience

Business Operations, Premises and Staff

Marketing Activity

Business Operations, Premises and Staff



Given the increased anxiety and drop in consumer confidence it will be even more vital to **update and highlight your COVID safety procedures and policies**. Ensure these reflects the relaxed restrictions and updated guidelines issued by NI Executive or Statutory agencies. Liaise with your local EHO, Tourism NI helpline or industry body for advice.

Ensure all frontline staff understand the ethos and criteria behind We're Good to Go (WGTG) Quality Marque and can communicate this effectively to customers. There is a considerable rise in awareness of the marque (now 50%, up from 37%). 41% of those surveyed said it would give them confidence that a business is safe.

Review your T&Cs and cancellation policy. Maximum flexibility will secure booking i.e. free cancellation, flexible transfer of booking, flexible gift vouchers etc (**32% said being able to make a flexible booking is an important factor in considering a short trip in NI**).

Schedule a refresher staff training session to update staff and include new recruits to ensure everyone is fully conversant with updated COVID Safety policies and new restrictions and guidelines.

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

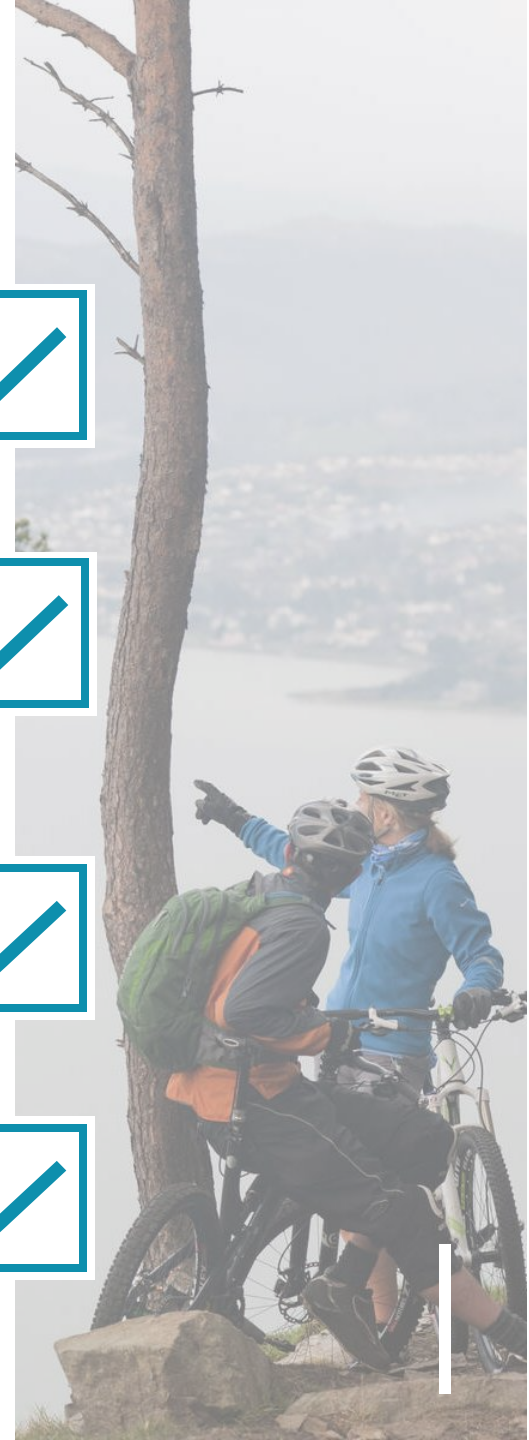
Marketing Activity

Value for money has become nearly as important as COVID-security in the mind of consumers, this delicate balance must be carefully communicated across all communication channels

Update your marketing plan to focus on resonating with younger market who are showing a high propensity to take short breaks (Social Instagrammers (37%) & Aspiring Families (32%) or longer breaks (Social Instagrammers (22%) & Aspiring families (22%). Digital platforms will be especially important communication and marketing channels for the younger target market

Review the key motivators to travel highlighted in this survey and shape your marketing message across all marketing communications and digital platforms to reflect these. Focus on messaging around relax and unwind/stress release as primary motivation to travel (59%), escape and get away from it all, safety reassurance and affordability and ease of taking a break in NI all important in marketing.

Revise and update email databases and customer lists to target returning customers, particularly those who have propensity to reschedule and 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.



Marketing Activity (similar to last survey)

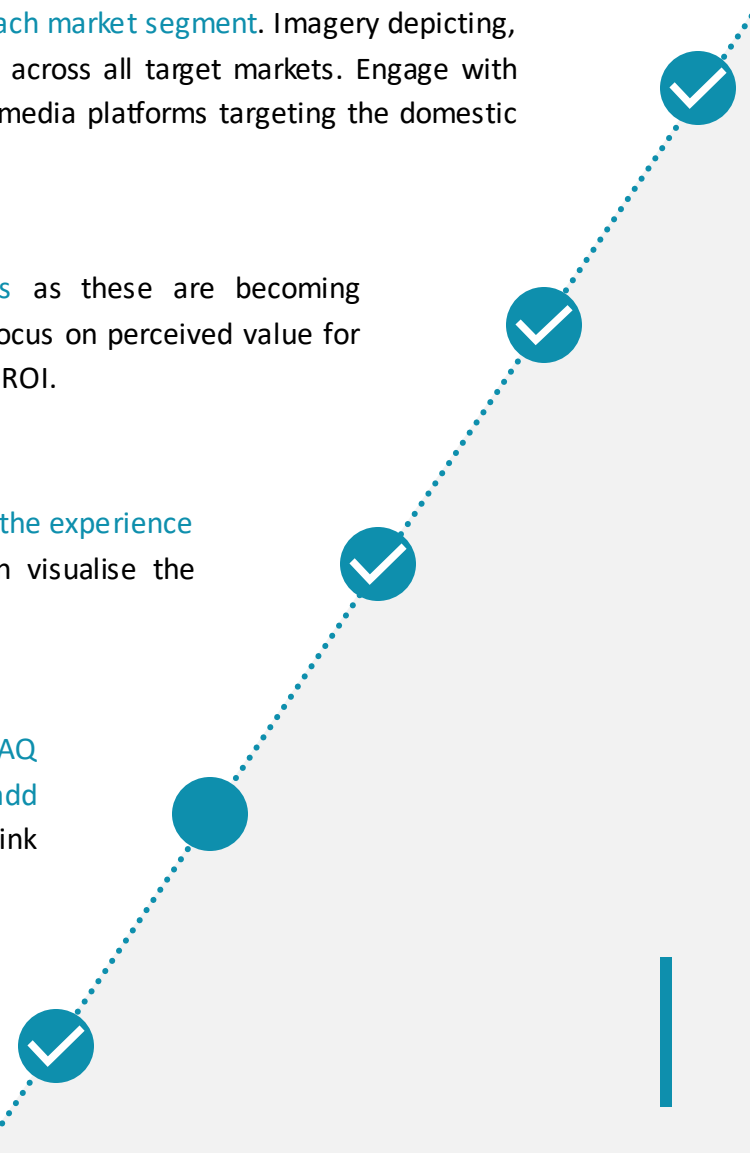
Develop messaging/content/high res. images/videos etc. to appeal to each market segment. Imagery depicting, green, open spaces, walking, hiking and outdoor activity will resonate across all target markets. Engage with Tourism NI and Local Council Autumn Marketing campaigns and social media platforms targeting the domestic market to drive and increase reach of individual marketing activity.

Focus on environmental and sustainability efforts or accreditations as these are becoming increasingly important factors in choosing holiday destinations. Also focus on perceived value for money (VFM) of Northern Ireland as a holiday destination, compared to 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.

Add T&Cs and cancellation policy to booking platforms and add a FAQ section to website to deal with common concerns and queries. Also add testimonials and a customer feedback function to your website and link with other platforms i.e. Trip Advisor.

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.





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

Click [HERE](#) to view full Wave 5 Consumer Sentiment Survey results.

