



Consumer Sentiment Research

NI Market – Takeaways for Industry

Wave 6 • December 2021

Introduction

The sixth wave (W6) of Tourism NI's Consumer Sentiment Research (carried out 11th November to 1st December 2021), surveyed a representative sample of the NI population to assess the evolving 'consumer mood' towards COVID-19, prevailing attitudes/motivators to travel within NI, as well as understanding recent travel experiences in NI.

Of the 400 people surveyed, 49% were female and 51% male, 47% were social group ABC1 and 53% were social group C2DE. 18% of those surveyed were pre family, 9% young family, 7% middle family, 21% older family and 44% empty nesters/older/no kids.

This survey took place as case numbers increased, alongside warnings that the health service faced its worst winter ever. Important to note media coverage relating to the Omicron variant did not emerge until the latter stages of the research.



[Link to full survey results HERE](#)

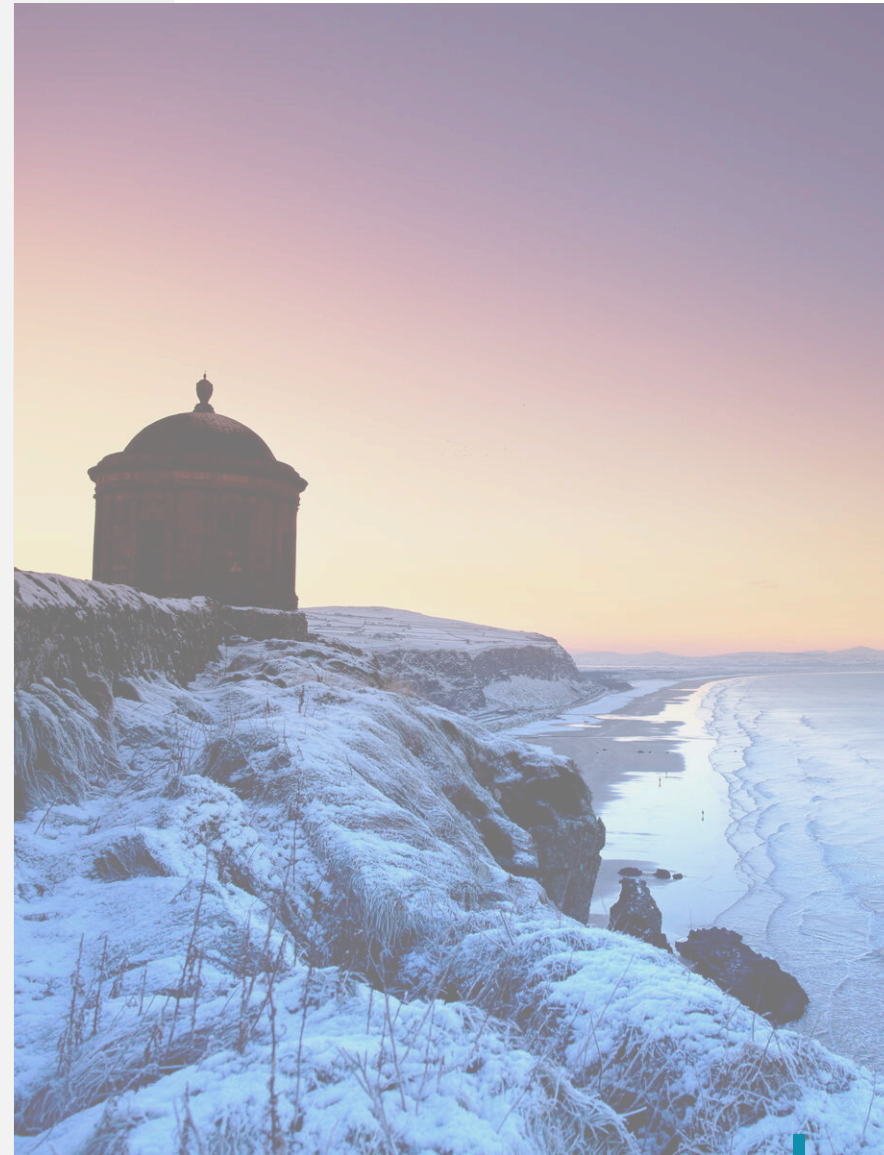
Summary

The spike in case numbers and the media attention around the new arrival of Omicron towards the end of the survey period has already resulted in a decrease in consumer confidence since the last wave of the survey. There has been an increase in the number who think the COVID-19 situation will get worse (38% compared to 29% at the Wave 5). There is a more negative outlook among mid-older family (43%) and older/no kids (46%).

There is a greater sense of nervousness about the COVID-19 situation in ROI than NI, with 49% in ROI thinking that the worst is still to come, compared to 38% in NI. However, it is positive that neither market sees a significant rise in anxiety.

Anxiety levels remain relatively unchanged from that recorded in Wave 5 of the survey, with those most likely to report being anxious frequently / all the time being females (47%), 18 to 34 year olds (47%) and pre family (45%).

Good value for money overall is now the number one travel trigger or motivator (43% up from 36%), with COVID secure environment number 2. Good quality accommodation and good quality food and drink are very important (number 3 and 4 at 39%), with the ability to make a flexible booking up 5% from previous waves at 37%.



[Link to full survey results HERE](#)

Wave 6 Survey – Key Points



The top triggers for considering a short break in Northern Ireland are **good value for money overall (43%)** and a **COVID secure environment (43%)**



There are many considering taking a break within NI in the next 3 to 4 months with **43% considering a day trip, 37% a short break and 19% a longer break**



For those planning a holiday in NI, the most important factors are a **COVID secure environment (50%), flexible booking (50%) and good quality food and drink (50%)**



Of those who took a trip to NI, **59% said that their trip exceeded expectations** and a further 33% said their expectations were met



The **option to cancel with full refund was the most attractive offer (52%)** to increase consideration of Northern Ireland



Of those whose expectations were exceeded, **the most positively rated aspects were the quality of accommodation,** hospitality and quality of food and drink

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 Consumer Sentiment Research.

Product and Experience



Business Operations, Premises and Staff



Marketing Activity



Product & Experience

NI residents' perception of NI safety remains stable at 71%, making a staycation in NI an attractive proposition to market.

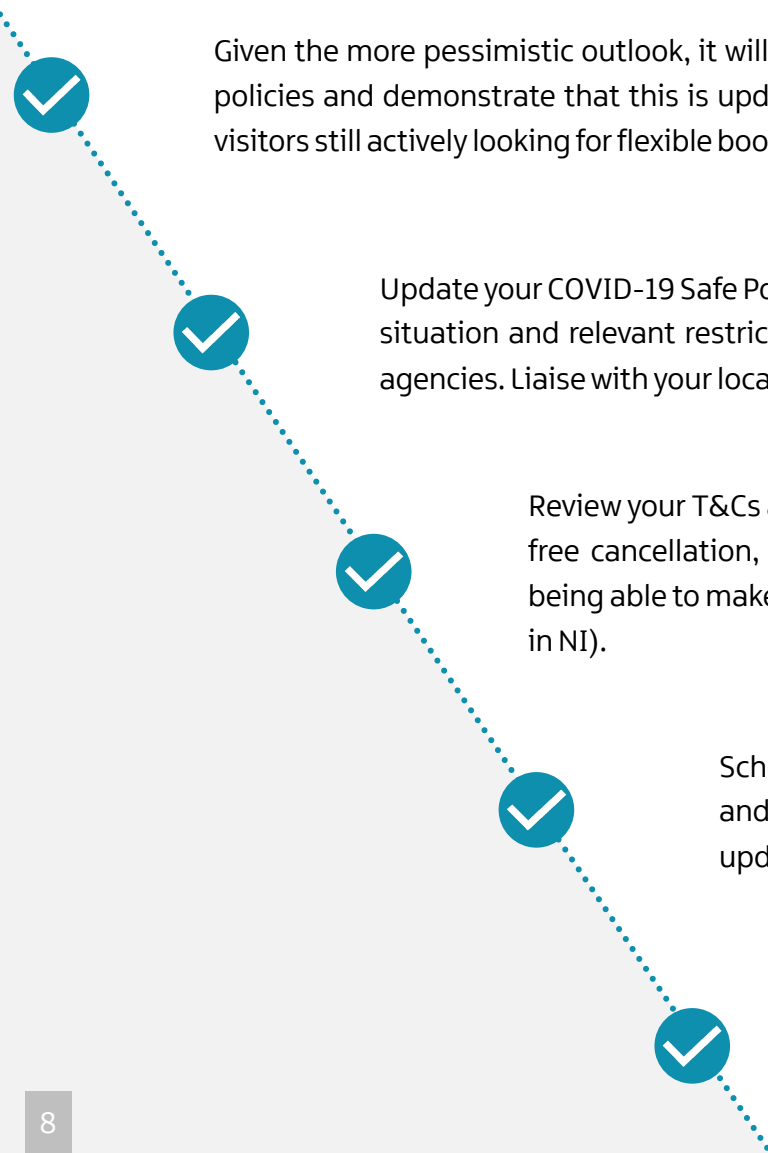
For the 2022 season, reassess in detail your product(s) and experience(s) against the core motivators/needs of key domestic market segments. For further information visit <https://tourismni.com/Grow-Your-Business/know-your-customer/markets-and-segments/ni-markets/>

Aligning your product/experience to appeal to the younger market will pay dividends. Intentions to take short breaks is highest amongst Social Instagrammers (45%) & Aspiring Families (53%). Intentions to take long breaks is also highest amongst: Social Instagrammers (29%) & Aspiring Families (33%).

Review the key motivators to travel highlighted in this survey and shape your products/experiences to reflect these. 'Relax and unwind' is still the primary motivator (56% down from 59% in W5 survey) and 'need to escape/get away' now 50% (up from 48% in W5).



Business Operations, Premises and Staff



Given the more pessimistic outlook, it will be even more vital to highlight your COVID safety procedures and policies and demonstrate that this is updated on a regular basis. This will make or break the booking, with visitors still actively looking for flexible booking terms and the option to cancel.

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

Review your T&Cs and cancellation policy. Maximum flexibility will secure booking i.e., free cancellation, flexible transfer of booking, flexible gift vouchers etc. (37% 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 early in 2022 to update staff and include new recruits to ensure everyone is fully conversant with updated COVID-19 Safety policies and new restrictions and guidelines.

Ensure all frontline staff understand the ethos and criteria behind We're Good to Go (WGTG) Quality Mark and can communicate this effectively to customers.

Marketing Activity

NI tourism industry should continue with cautious, COVID-secure messaging to alleviate the feelings of anxiety in the domestic visitor market. Although COVID concerns grow slightly, mood has not been hit.

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

Prepare a marketing plan for the 2022 season which resonates with younger market who are showing a high propensity to take short breaks. 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.



Marketing Activity (similar to last survey)

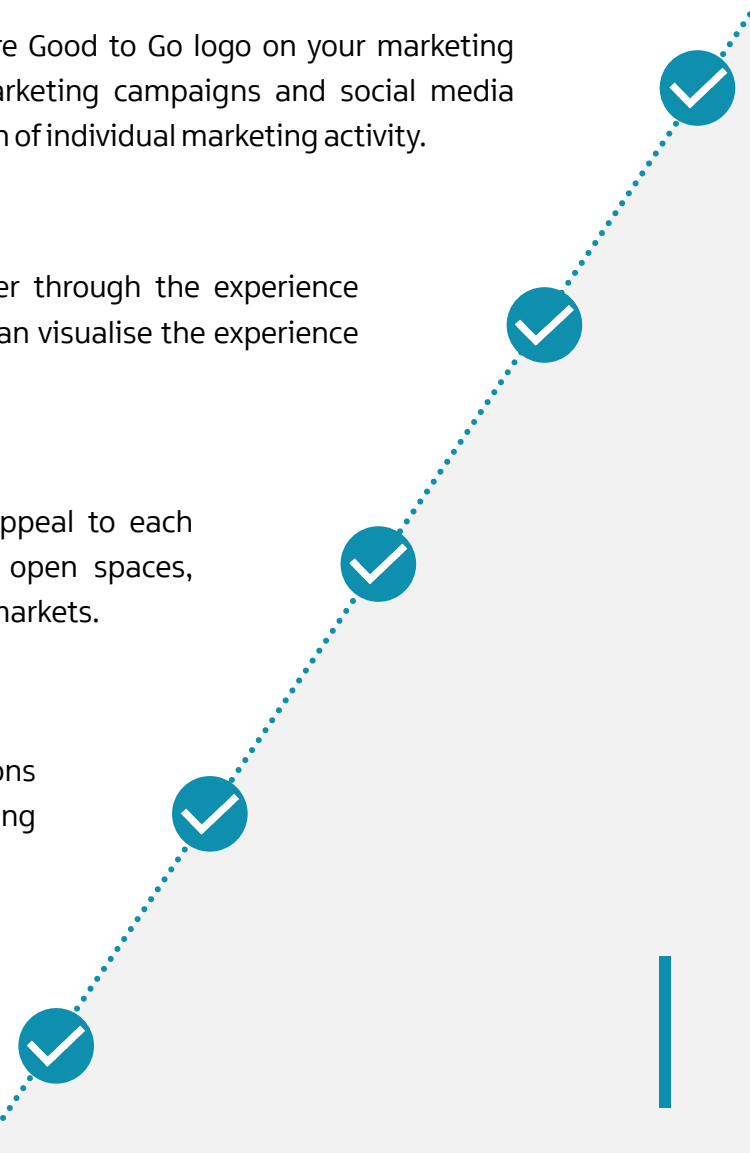
Clearly display a link to your COVID-19 Safe Policy and your We're Good to Go logo on your marketing material. Engage with Tourism NI and Local Council Spring Marketing campaigns and social media platforms targeting the domestic market to drive and increase reach of individual marketing activity.

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 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.

Focus on environmental and sustainability efforts or accreditations as these are becoming increasingly important factors in choosing holiday destinations, particularly given recent focus on COP 26.

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 December 2021 by the Tourism NI Insights and Intelligence Service.

Click [HERE](#) to view full Wave 6 Consumer Sentiment results.