



Consumer Sentiment Research

NI Market – Takeaways for Industry

Wave 12 • April 2023



Introduction

The twelfth wave (W12) of Tourism Northern Ireland's (TNI) Consumer Sentiment Research (carried out 22nd March to 11th April 2023), surveyed a representative sample of the Northern Ireland (NI) population to understand consumer sentiment, behaviours and attitudes towards travel. Wave 12 also focused on exploring NI consumers' perceptions of the Food & Drink offering in NI.

The research also reflects the balance of our key domestic market demographics. Of those surveyed, 54% were in the ABC1 social group and 46% were in the C2DE group. One-fifth of those surveyed were pre families, 10% were young families, 10% were middle families, 24% were older families and 35% were empty nesters/older/no kids.



[Link to full survey results HERE](#)

Wave 12 Survey – Key Points



Following on from a positive 2022 performance, findings indicate continued **high levels of domestic visitor volumes** for the opening quarter of 2023.



Encouragingly, **intentions** for NI leisure day trips over the spring and early summer 2023 are **significantly higher** than was reported for the same period last year.



NI consumers' 2023 travel intentions point to a generally steady performance for both short and longer breaks across the spring and summer months. Competition from Republic of Ireland (ROI) and Great Britain (GB) remains strong however, with a **significant increase in those considering a longer break abroad** also evident.



Coastal and **rural** locations are seen as the most popular choice for upcoming spring/summer 2023 domestic breaks. NI **city breaks** remain the preferred option for almost one third of NI consumers.



The top trip motivations for intended NI trips are **relaxation** (51%), **escapism** (35%) and **fun** (38%).



Whilst intentions to **holiday abroad** have increased, a significant proportion of NI consumers are ruling out this option as being **too expensive**. This brings opportunities to grow staycations by stressing NI's value for money.

[Link to full survey results HERE](#)

Key Industry Takeaways – Food & Drink

For NI consumers, enjoying the food & drink experience was a **key motivator** for around a quarter of people when considering their next NI trip. Most notably, over two thirds of NI short break/holiday takers researched places to eat before their last NI trip and a **third of short break/holiday takers actually booked before arriving on their trip.**

The most popular sources of information when researching places to eat out include **Google** (44% used for research) and **social media** (39%). **Online review sites** (25%) also remain important.

The impact of **word-of-mouth** is also not to be underestimated, with advice from accommodation providers (14%) and locals (17%) also playing an important role when helping domestic visitors decide on places to eat.

Over 9 in 10 domestic visitors said their food & drink experience **met or exceeded their expectations.**

In relation to food & drink experiences in NI, the local pub experience comes to the fore for NI consumers, with a **clear appetite being shown for experiencing local produce.**

For NI consumers, there are key opportunities around the appeal of the NI food and drink offer, with high levels evident of interest across a wide range of experiences such as **casual street food/ truck dining, brunch ideas** and **afternoon tea experiences.** Almost one third identified distillery/ brewery tours as being particularly appealing.



[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 survey and other recent waves of Consumer Sentiment Research.

Product and Experience



Marketing Activity



Product & Experience

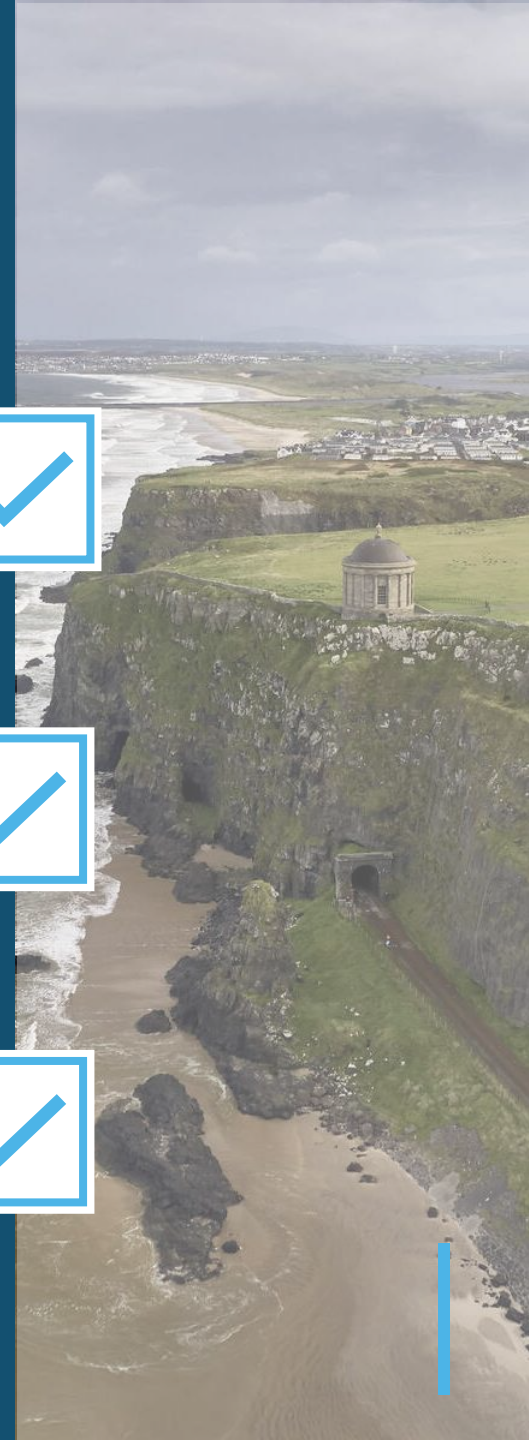
Continuously assess your product(s) and experience(s) against the core motivators/ needs of key domestic market segments, i.e. Aspiring Families and Natural Quality Seekers and Social Instagrammers. For further information visit:

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

Identify which elements have the most appeal and how you could enhance the experience to make it more compelling.

Review the key motivators to travel highlighted in this survey and shape your products/ experiences to reflect these. Relaxation is the primary motivator (51%) followed by having fun (38%) and escapism (35%). Don't forget the strong appeal of local food & drink experiences which the research indicates can be powerful motivating factor for a significant proportion of considering their next NI short break.

Tourism NI research at the start of 2023 confirmed that consumers want to reduce spend on trips without compromising on experience. We should ensure that the messaging reflects this.



Marketing Activity

Focus on environmental and sustainability efforts or accreditations as these are becoming increasingly important factors in choosing holiday destinations for NI domestic market and indeed all other markets.



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 relaxation, escapism and having fun – all important in marketing.



Continually review your website for improvements, remembering the survey indicator that one third of NI domestic visitors are likely to book accommodation directly with the providers' own website. 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 e.g., Trip Advisor are working.



Value for money score holds steady for NI, and still well above key competitors, including ROI and GB.



Marketing Activity

Revise and update email databases and customer lists to target returning customers. Ensure your product/ experience is listed/ updated on www.discovernorthernireland.com. For further information on how to do this see:

<https://www.tourismni.com/business-guidance/opportunities-campaigns/creating-and-updating-your-tourism-product-on-discovernorthernireland.com/>.

Research indicates that almost one third of domestic visitors can be motivated by the desire to enjoy/ discover a new area of NI not previously visited, so when appropriate, always maximise opportunities to signpost local attractions & experiences – don't assume local knowledge.

Develop messaging/ content/ resolution images/ videos etc. to appeal to each market segment in line with this latest survey.

Engage with Tourism NI and Local Council marketing campaigns and social media platforms targeting the domestic market to drive and increase reach of individual marketing activity.

Add testimonials and a customer feedback function to your website and link with other platforms, e.g., Trip Advisor. Regularly monitor and update.





Produced in May 2023 by Tourism NI's Insights and Intelligence Service

Click [HERE](#) to view full Wave 12 Consumer Sentiment results

