



# Consumer Sentiment Research

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## NI Market – Takeaways for Industry

Wave 10 • January 2023

# Introduction

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The tenth wave (W10) of the Consumer Sentiment Research (carried out 9th to 23rd December 2022), surveyed a representative sample of the Northern Ireland (NI) population to monitor consumer attitudes towards travel in NI and elsewhere, and help inform how current issues, e.g., cost of living, have impacted on consumer behaviour and travel intentions.

The research also reflects the balance of our key domestic market demographics. Of those surveyed, 48% were social group ABC1 and 52% were social group C2DE. 19% of those surveyed were pre family, 10% young family, 7% middle family, 20% older family and 45% empty nesters/older/no kids.



[Link to full survey results HERE](#)

# Key Industry Takeaways

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Results point to continued **high levels of domestic visitor volumes in 2022**, with most having an extremely positive experience. For breaks across the Island of Ireland, a significant proportion of NI consumers are **still booking closer to the date of travel** than they would have pre Covid.

Most NI respondents expressed **positive emotions when looking to the New Year**. When thinking ahead to holidays planned for 2023, excitement and optimism were the top emotions expressed.

The **value for money score for NI is stable** and still well ahead of both Republic of Ireland (ROI) and Great Britain (GB).

**Intentions of taking a break in early 2023 are stable** against recent waves for short and long breaks, with a slight dip for day trips. Competition from ROI and GB remains strong however, with a significant increase in those considering a longer break abroad also evident.

NI Domestic Market visitors are looking for a **laid-back holiday** with opportunities for relaxation and escapism being key drivers.

The ease with engaging with activities this winter/spring continues to grow, particularly for pubs/restaurants, indicating that NI has entered something of a post Covid mentality.



Link to full survey results [HERE](#)

# Key Industry Takeaways – Cost-of-living

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The cost-of-living crisis is now more prevalent in the minds of NI consumers than the pandemic.

**However, concerns around the cost-of-living issue have reduced since the previous survey wave**, suggesting that anxiety has peaked. There has been a big drop in the number of those expecting to be significantly negatively affected by the cost of living in NI, down from 54% in wave 9 to 40% in the latest research wave.

**Around a third (35%) of NI consumers will continue to treat themselves to unique/special experiences** this year despite cost-of-living increases.

Compared to this time last year (winter 2021), the activities which respondents will be doing less of, include visiting paid attractions (41% doing less), eating out in restaurants (38% doing less), engaging in paid activities (38%) and going to pubs/bars (37%). There is **still interest in outdoor activities and free attractions**.

**The key impact on day trip behaviours will still be a focus on “free things” to do** (52%), with 43% saying they will spend less on eating out. For those who will reduce day trips or travel closer to home, the top reason is the **cost of fuel** although this has dropped back significantly (61% in wave 10 compared to 72% in Wave 9).

When thinking ahead to holidays in 2023, almost half (48%) of NI consumers are excited, 29% feel optimistic and 27% have a feeling of anticipation.



Link to full survey results [HERE](#)

# Wave 10 Survey – Key Points

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While there is still a sense of worry about the cost-of-living, many respondents are still relatively optimistic, with **almost half (46%) of NI consumers saying they "intend to keep doing things I enjoy in 2023"** even if the impact of cost-of-living increases is a concern".



The proportion of NI residents planning to reduce spending on leisure day trips remains high but has declined compared to the October survey wave.



Whilst the **majority have expressed a preference for coastal and countryside breaks**, a city break remains popular for around one third of NI consumers.



Of those NI dog owners planning to take an NI trip, **4 in 5 said they would bring their dog with them if they could.**



The top trip motivations for intended NI trips are **relaxation (46%), escapism (33%)** and fun (30%).



NI consumers' travel intentions indicate a generally steady performance for short breaks in the first quarter of 2023. Competition from ROI and GB remains strong however, with a **significant increase in those considering a longer break abroad** also evident.

Link to full survey results [HERE](#)

# Checklist for Industry

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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

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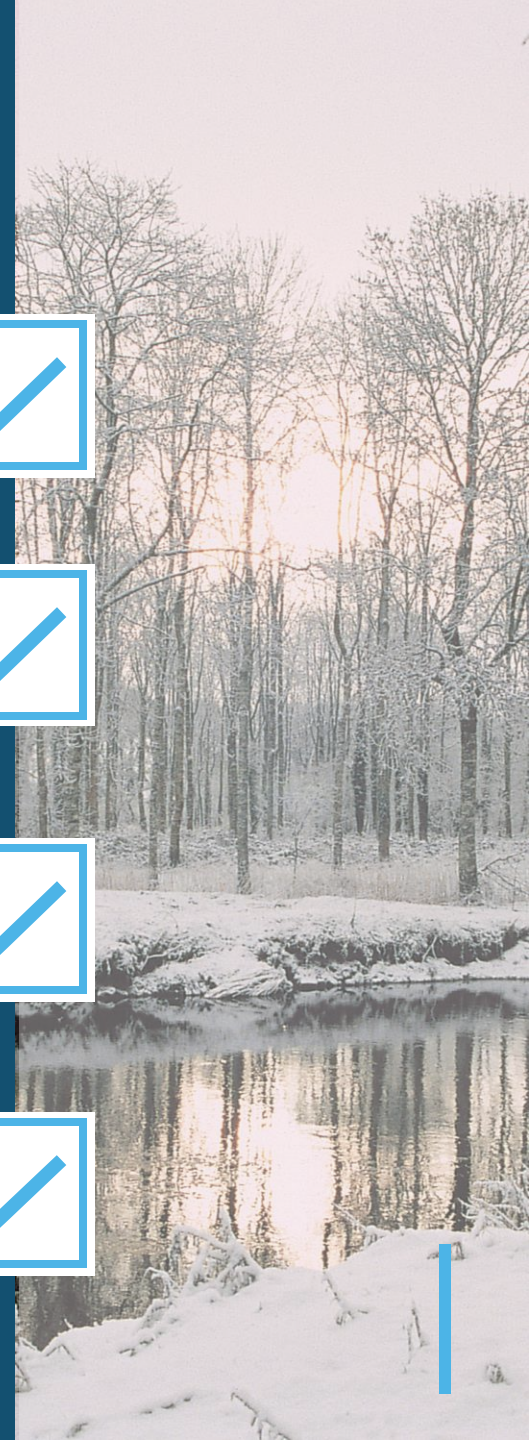
Although there is caution about spending on experiences / holidays, a third still want to treat themselves to unique experiences and this is driven by under 35s and the Social Instagrammers segment. Experiences can be targeted at these groups for maximum effectiveness.

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/>


Review the key motivators to travel highlighted in this survey and shape your products/ experiences to reflect these. Relaxation is the primary motivator (46%) followed by escapism 33% and having fun 30%.

The ease with engaging with activities this winter/ spring continues to grow particularly for pubs/ restaurants (64% now feel at ease) indicating that NI has entered something of a post Covid mentality.




# Business Operations, Premises and Staff


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Despite reduced concerns around Covid, some people are still nervous, so it is important to keep Covid Safe messaging available in your pre booking information and onsite. This does not have to be as front and central as before, but it should be available for those who are looking for it.




Businesses signed up to the **We're Good to Go, the industry standard** are encouraged not to display the certificate and to remove the logo where possible but are not expected to incur costs in doing so, and therefore may retain the logo on any printed marketing material currently in use.




Review your Policy and Risk Assessment to ensure it reflects the relaxed restrictions. Ensure all frontline staff can communicate this balance of approaching normality with awareness of safety and cleanliness.



Review your T&Cs and cancellation policy for 2023 bearing in mind that people are still booking much later than pre Covid, so a degree of flexibility will still secure booking.



It is still a good idea to have sanitisers available in certain areas, particularly in areas serving food and drink, toilets or reception areas.





# Marketing Activity

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Around a third (35%) of consumers will continue to treat themselves to unique/ special experiences this year in spite of the cost of living with Social Instagrammers (49%), Pre family (48%) and 18 - 34s (47%) being most likely to say they will treat themselves.

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.

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

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Revise and update email databases and customer lists to target returning customers. Ensure your product/ experience is listed/ updated on [www.discoverni.com](http://www.discoverni.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/>.

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

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.

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.

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 January 2023 by Tourism NI's Insights and Intelligence Service.

Click [HERE](#) to view full Wave 10 Consumer Sentiment results.