



Consumer Sentiment Research

ROI Market – Takeaways for Industry

Wave 10 • January 2023

Introduction

The tenth wave (W10) of Tourism Northern Ireland's (TNI) Consumer Sentiment Research (carried out 9th to 23rd December 2022), surveyed a representative sample of the Republic of Ireland (ROI) population to monitor consumer attitudes towards travel in Northern Ireland (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 ROI market demographics. Of those surveyed 55% were in the ABC1 social group and 45% were in the C2DE group. One-fifth of those surveyed were pre families, 14% were young families, 9% were middle families, 28% were older families and 29% were empty nesters/older/no kids.



[Link to full survey results HERE](#)

Key Industry Takeaways

There is real **optimism** among ROI consumers for 2023. The main emotions indicated are optimism (33%) and **excitement** (29%).

Almost four in ten ROI consumers are still **booking Island of Ireland short breaks closer to the date of travel** than they would have pre Covid.

ROI is significantly more likely than NI to be seen as offering poor value for money (VFM), translating into some potential **competitive advantage for NI**, although both Spain and Portugal remain in pole position when it comes to perceived VFM.

1 in 5 ROI consumers are considering a short break in NI in early 2023. 1 in 3 of those considering short breaks are currently actively planning or have booked, with April the most likely month to have a short break. **Competition will be fierce** as short break consideration for ROI and Great Britain (GB) remains strong, and the intention to take a long break abroad is significantly up amongst ROI consumers.

The top holiday motivations for those in ROI are **escapism, relaxation** and **opportunities to discover new parts of NI**.

Around half of those considering an NI trip would prefer **coastal** and **countryside** breaks, reflecting the growing desire amongst some for a **relaxing** trip offering **escapism**. An **NI city break** also remains equally as popular.



[Link to full survey results HERE](#)

Key Industry Takeaways – Cost of living

It appears that cost of living is now a more significant issue for consumers than Covid-19. Anxiety levels relating to Covid-19 remain low, with the majority of consumers in both markets believing that the worst has passed.

Although we appear to be past the peak when it comes to cost of living concerns in the ROI Market, the vast **majority still expect to see negative effects over the coming months.**

There is generally **less expectation to reduce spending** compared to Wave 9. Almost two-fifths won't be reducing their spending on holidays/ short breaks at home (up 9 percentage points (pps) from Wave 9), one third won't be reducing spending on events and festivals (up 11 pps from Wave 9) and 27% won't be reducing their spending on eating out at restaurants (up 3 pps from Wave 9).

Just over half still expect to make some reductions to the amount spent on, or number of, trips they take.

Only a quarter say they will reduce the quality of the experience. This notion of quality is particularly prevalent amongst under 35s and Active Maximisers.

Almost half of ROI consumers will be looking to **treat themselves** to unique/special experiences in 2023 .



[Link to full survey results HERE](#)

Wave 10 Survey – Key Points



Results point to high levels of ROI visitor volumes, with 17% saying they have taken a short or long break in NI in 2022. Of these, over half were first time visitors to NI.



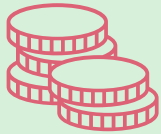
Looking ahead to early 2023, trip intentions to NI are stable compared to previous waves. Competition from ROI and GB remains strong however, with a significant increase in those considering a longer break abroad also evident.



For ROI residents travelling within NI in 2022, 38% had their expectations met and over half had their expectations exceeded.



Of those ROI dog owners planning to take an NI trip, almost 6 in 10 said they would bring their dog with them if they could.



We appear to be past the peak when it comes to cost of living concerns in the ROI Market. However, the vast majority still expect to see negative effects over coming months. 41% expect to be significantly negatively affected and 49% expect to be slightly affected.



There has been a slight increase in value for money perceptions for NI among ROI consumers after the significant drop in Wave 9.



The survey reflects a real sense of optimism. When thinking ahead to holidays in 2023, 50% of ROI consumers are excited, 31% feel optimistic and 21% feel motivated.

Link to full survey results [HERE](#)

Checklist for Industry

The following **Checklist for Industry wishing to target the ROI Market** reflects the key findings from this current Consumer Sentiment Survey.

Product and Experience



Business Operations, Premises and Staff



Marketing Activity



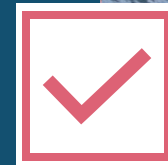
Product & Experience

Although there is caution about spending on experiences/ holidays, a third still want to treat themselves to unique experiences.


Assess your product(s) and experience(s) against the core motivators/ needs of key ROI market segments, i.e., Open-Minded Explorers and Active Maximisers. For further information visit <https://tourismni.com/Grow-Your-Business/know-your-customer/markets-and-segments/ROI-Market/> Identify which elements have most appeal, how could you enhance their appeal and make the experience more compelling?

Consumers want to reduce spend on trips without compromising on experience. We should ensure that the messaging reflects this.


Review the key motivators to travel highlighted in this survey and shape your products/ experiences to reflect these. Escapism is now the main holiday motivation (34%), followed by relaxing/unwinding (33%) to enjoy/ discover a new part of NI they have not visited before (31%) and trying something new (20%).




Business Operations, Premises and Staff




Despite reduced concerns around Covid, some people in the ROI market 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 currently 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. It is still a good idea to have sanitisers available in certain areas, particularly in areas serving food and drink, toilets or reception areas.



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.

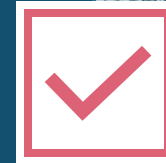


Marketing Activity

Many are likely to book closer to date of travel than they would have pre Covid, so timing of marketing activity is crucial.



Almost half (45%) will continue to treat themselves to unique/ special experiences this year despite cost of living with Pre family (61%) and 18 - 34s (56%) 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 and escapism.



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

Focus on environmental and sustainability efforts or accreditations as these are becoming increasingly important factors in choosing holiday destinations for ROI market.

Engage with Tourism NI and local Council Spring marketing and promotional campaigns and regularly supply content for social media platforms targeting the ROI market to drive and increase reach of individual marketing activity.

Ensure your product/ experience is listed/ updated on 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/high resolution images/videos etc. to appeal to each market segment in line with this latest survey.

Revise and update email databases and customer lists to target returning customers.





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

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

