



Consumer Sentiment Research

ROI 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 Republic of Ireland (ROI) population to understand consumer sentiment, behaviours and attitudes towards travel. Wave 12 also focused on ROI consumers' perceptions of the Food & Drink offering in NI.

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. Almost one-fifth (19%) of those surveyed were pre families, 13% were young families, 16% were middle families, 31% were older families and 22% were empty nesters/older/no kids.



[Link to full survey results HERE](#)

Wave 12 Survey – Key Points



Following on from a positive 2022 tourism performance, findings point to **continued high levels of ROI visitor volumes** for the opening quarter of 2023.



Similar to recent 2022 trends, approximately half of ROI visitors to NI in the first quarter of 2023 were **first time leisure visitors**.



The food & drink experience was highly rated by ROI visitors, with the vast majority saying it met or exceeded their expectations.



City breaks remain the most popular type of NI trip for ROI consumers.



Coastal and countryside breaks also remain popular, reflecting the growing desire amongst some for a relaxing trip offering escapism.



Two fifths of ROI consumers plan to book their accommodation for their next NI visit **directly with the provider's website**. A further third will use travel comparison websites.

Link to full survey results [HERE](#)

Key Industry Takeaways

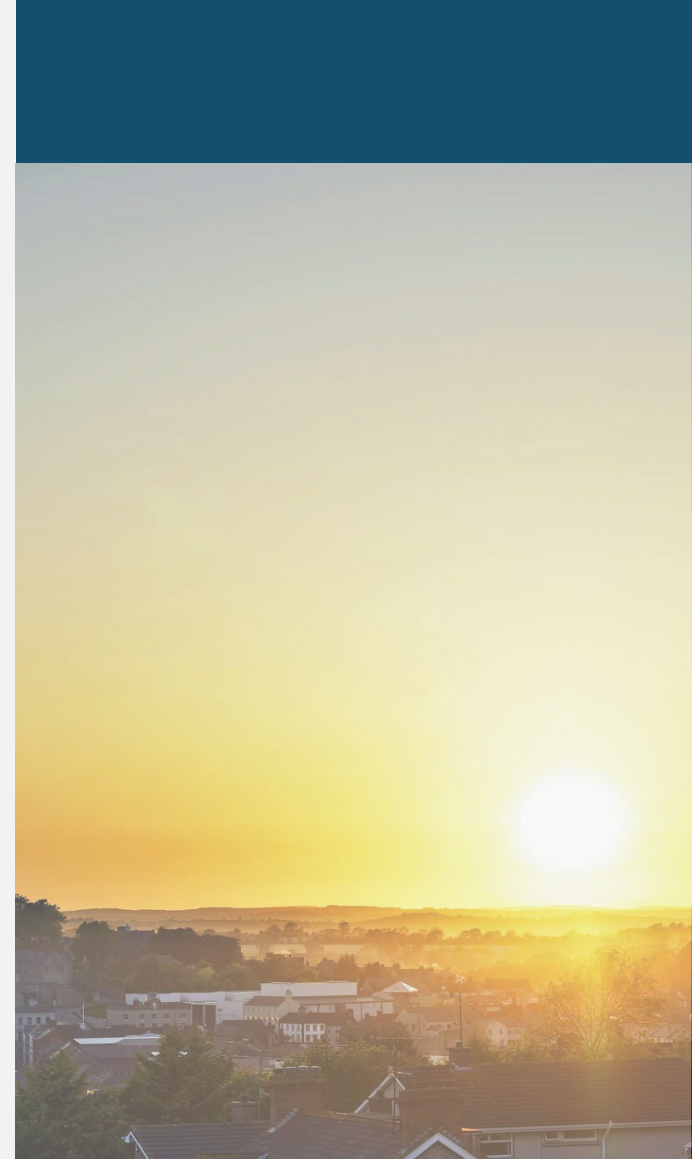
ROI consumers' **short break intentions** indicate a generally positive performance for April to June 2023.

For July and August however, results indicate a slight dip in ROI consumer intentions for both **short and longer holiday breaks in Northern Ireland (NI)**, likely impacted by continued growth in intentions to holiday abroad.

While **holidays abroad** have grown in popularity over the summer months, there is also evidence that a significant proportion of prospective travellers have to date ruled out this travel option **as being too expensive**. This brings opportunities to grow staycations by stressing NI's value for money (VFM).

Overall, NI's VFM score continues to improve with ROI consumers **rating NI's VFM more positively than ROI and Great Britain (GB)**, although both Spain and Portugal remain ahead of NI when it comes to perceived VFM.

For ROI consumers, to **relax and unwind** and to **have fun** are key motivators for intended NI trips, with the opportunity to enjoy **NI's food & drink** experience particularly important for those considering a NI break.



[Link to full survey results HERE](#)

Key Industry Takeaways – Food & Drink

For ROI visitors, enjoying the food & drink experience was **one of the key motivators** for their NI trip, with the majority having researched places to eat before their trip, with **40% actually booking before arriving on their trip.**

The most popular sources of information when researching places to eat out include **Google** (41% used for research) and **social media** (40%). **Online review sites** (20%) 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 visitors decide on places to eat.

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

For ROI consumers, there are key opportunities around the appeal of the NI food and drink offer, such as **distillery/ brewery tours** and **afternoon tea experiences**, which appeal to around a quarter of ROI consumers when considering a NI break.



[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 survey and other recent waves of consumer sentiment research.

Product and Experience



Marketing Activity



Product & Experience

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?

Tourism NI research at the outset of 2023 confirmed that consumers want to reduce spend on trips without compromising on experience. We should ensure that the messaging reflects this. Despite cost-of-living concerns, NI's value for money score continues to improve, with consumers in ROI rating NI's value for money more positively than ROI and GB.

Review the key motivators to travel highlighted in this survey and shape your products/ experiences to reflect these. To enjoy food & drink features as a top NI holiday motivation (35%), followed by having fun (33%) to relax and unwind (31%).

Maximise opportunities to signpost the uniquely local food & drink experiences on your doorstep and remember the power of word-of-mouth recommendations.



Marketing Activity

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, embedding as appropriate the significant appeal of the local food and drink experience.



Continually review your website for improvements, remembering the survey indicator that for accommodation providers, two fifths of your ROI customers are likely to book direct. 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.



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



Marketing Activity

Ensure messaging highlights the value of your product and/ or experience. Despite cost-of-living concerns, many ROI consumers regard NI as offering good value-for-money.

Engage with Tourism NI and local Council 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.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/>

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 May 2023 by Tourism NI's Insights and Intelligence Service

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

