



Republic of Ireland Market Strategy

2021-2026

Strategy Reporting Document



Judith Owens, Chairperson, Strategy Steering Group.

The tourism industry in Northern Ireland, and globally, has faced unprecedented disruption due to the **Covid-19 pandemic**. It is within this context, and that of Brexit, that the Republic of Ireland (ROI) Strategy Refresh has been undertaken.

This work is the logical follow-on to the strategy developed by the ROI Recovery Taskforce in 2016. That strategy identified methodologies for restoring sustainable growth to Northern Ireland (NI) from ROI holidaymakers up to 2020. The strategy helped develop a deeper understanding of the key dynamics of the ROI market, barriers to visiting Northern Ireland and opportunities for growth.

An increased level of activity was undertaken in the ROI market based on the strategy. Increased Public Relations and a focused, dedicated ROI advertising campaign was implemented to target key

segments identified in strategic research. Consequently, **the ROI market grew considerably to a value of £142m in 2019.**

Our work in recent years provides us with a strengthened base from which to target the ROI visitor. Our industry is a better equipped collective which understands the ROI market and is energised and ready to compete and win in the time ahead.

As we emerge from travel restrictions and consumers remain tentative about foreign travel; **now is a once-in-a-generation opportunity to introduce all that Northern Ireland has to offer to the ROI consumer.**

Market Context

Prior to the COVID-19 pandemic, the NI tourism and hospitality industry employed **65,000 people** and generated **£1 billion** in revenue in **2019**.¹

From 2016 to 2019 ROI resident overnight trips rose from 445,000 to 755,000, an **increase of 66 percent** in volume, and, importantly, **104 percent in spending terms.** ROI visitors represented 25 percent

of all external overnight visitors (excluding NI residents) in 2019 and accounted for 20 percent of spend. The ROI market is predicted to grow into the future. It represents a key element of the tourism market and one of increasing importance to Northern Ireland.

An Ambition for Growth

This strategy charts a **realistic ambition for the tourism sector** should appropriate decisions, investment and industry collaboration be implemented.

It is the **NI tourism industry** that creates the experiences, memories and collateral for every tourist visitor and it is essential that the correct environment, support and enthusiasm be mobilised to **enable tourism businesses to succeed, strengthen and prosper to 2026.**

The Northern Ireland brand is generating traction in the **ROI market** and, in particular, the **Embrace a Giant Spirit experience** brand is driving overall interest.

In a growing marketplace Northern Ireland grew market share of ROI trips on the island of Ireland from a share of **4.5 percent to 7 percent from 2016 to 2019.**

Therefore, we have set an ambitious and realisable target to achieve a **10 percent value share of ROI trips on the Island of Ireland.**



¹<https://www.tourismni.com/industry-news/tourism-recovery-steering-group-set-up-for-northern-irelands-tourism-sector/>



A Focused Industry

Having conducted a complete review of the ROI market we have developed a new segmentation strategy.

Comprehensive segmentation in our last strategy proved to be a successful enabler for industry; allowing complete packages and connected experiences to be developed for the ROI market. A new segmentation solution has been established which identifies six potential segments, three of which have been defined as priority segments.

These three segments represent the best opportunity to drive tourism growth from ROI.

The priority segments are: **Active Maximisers** and **Open-Minded Explorers** in the short, medium and long term, and **Indulgent Relaxers** in the short term.

PRIORITY SEGMENTS

Active Maximisers

Open-Minded Explorers

Indulgent Relaxers

A Strategy for Growth

The strategy to deliver growth embodies three inter-related and dependent strategic pillars. These are key areas of focus, guiding decision making and setting the agenda for actions to drive and sustain growth from the ROI market.

The three pillars are:

Collective Effort - Industry Engagement and Development

Developing and supporting a motivated, engaged, connected and committed industry that is focused and equipped to win in the ROI market.

Compelling Communications - Powerful messaging

Delivering consistent, connected and motivating communications that builds knowledge of what Northern Ireland has to offer and clear and compelling reasons to go.

Constant Purchasability - Maximising conversion

Creating the conditions through which compelling and connected short break propositions (accommodation, attractions and experiences) are easily accessed and purchasable.

The Northern Ireland tourism industry has developed and grown a product which has proven resonance in the ROI market. By taking time at the worst of times to plan ahead for growth and better days we are exhibiting an ambition to succeed.

Doubtless our industry is experiencing and working through unprecedented events. Our tourism industry has delved deeply into reserves of resilience. It is this resilience, ambition and collective energy that will sustain us in the time ahead.

There is a latent readiness in the ROI visitor to visit and spend. With the correct ambition, vision, resources, co-operation and momentum our industry will thrive and prosper in the years ahead. This plan gives us the starting point, the direction and the focus to succeed.



Judith Owens





1. Where are we starting from?

At the time of writing this document (November 2021) the global tourism sector, as a consequence of the Covid 19 pandemic, has largely been on pause for 18 months. However, the sector can look forward with optimism and ambition.

A new norm will emerge quickly and undoubtedly the ROI market will play a vital role in driving sector recovery and delivering sustainable future growth in Northern Ireland.

Performance over the period of the strategy

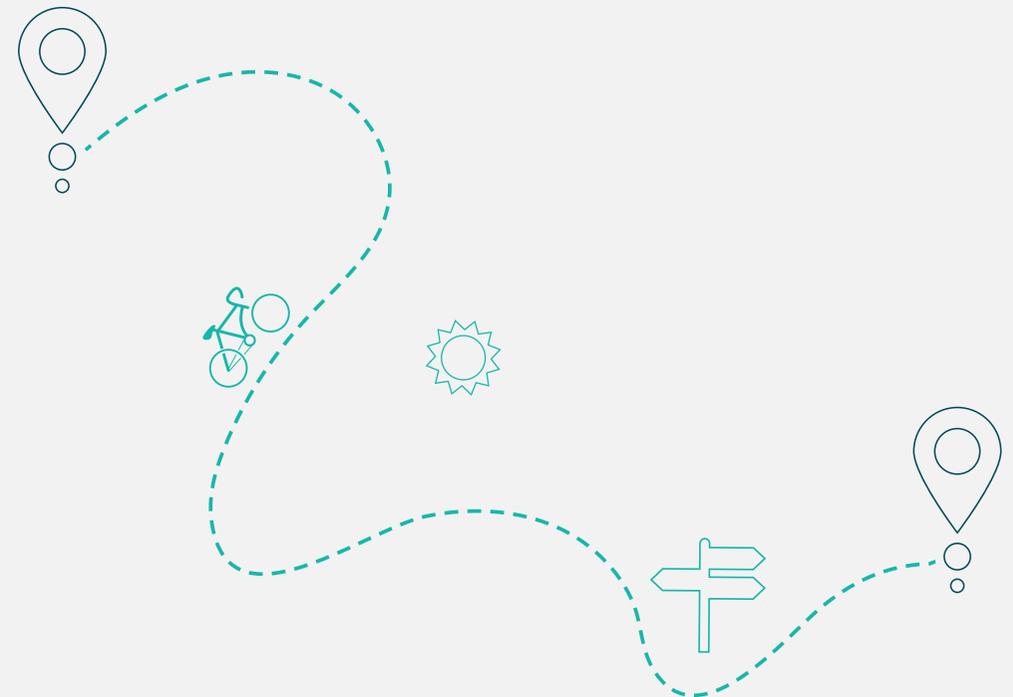
As outlined in the introduction to this document, the period of the previous ROI strategy (2016 to 2019) delivered unprecedented growth in terms of visitor numbers and spend.

More specifically, in 2015, prior to the implementation of the ROI strategy, **336,000 overnight trips** were made by ROI residents to Northern Ireland. 2016 saw a dramatic increase in performance with a growth of **35 percent (454,000) in overnight trips** and a growth in spend of **13 percent**. This growth was then sustained up to 2019, during which **755,000 overnight trips** were made by ROI residents. This represents a **total growth of 66 percent** for the period 2016 to 2019 in terms of trips, with spend growing by an impressive **104 percent** over the same period.

Based on these figures it is important to note from 2016 to 2019 ROI's share of 'external' overnight visitors, i.e., all visitors to Northern Ireland excluding NI residents, grew from **17.5 percent to 25 percent** in terms of volume and from **11 percent to 19 percent** in terms of spend. This emphasises not only the growth of the ROI market but its increased importance to the tourism sector in Northern Ireland.

Key factors that will determine future performance

In planning for the future, and with the intention to build momentum and drive the performance of the ROI market, it is important to examine and understand the key factors that underpinned recent performance and perhaps more importantly those that are likely to influence future performance.



Key factors

Macro-economic factors

During the period of the last strategy, buoyed by consumer confidence and good disposable income levels, the ROI market performed strongly. Critically, consumer confidence was consistently positive and disposable income levels showed growth.

In spite of the impacts of the pandemic the ROI economy has rebounded strongly in 2021.

Additionally, as the new norm emerges there is a likelihood that household savings will be freed up leading to an increase in consumer spending. Overall, the ROI economy is expected to grow by 7.2 per cent in 2021 and domestic demand is placed for a strong recovery. Furthermore, ROI economic recovery is predicted to continue strongly into 2022 (European Commissions Economic Forecast July 2021).

Notably, **forecasting by EY** (March 2021) estimates that while it will most likely be the end of 2024 before the NI hospitality sector fully recovers, the ROI market is forecast to be the sole market that delivers growth ahead of FY 2019, with a projected growth of six percent being delivered.

The European Union economy, of which ROI is one of the strongest performers, is expected to return to its pre-pandemic level of GDP by the end of 2021 (European Commissions Economic Forecast Summer 2021).

From a **population** perspective, the ROI population is forecast to grow by 5% to 2025, reaching 5.25 million (CSO Population Forecast). Notably there will be a higher density of population in the Greater Dublin Area, which has the largest household incomes in ROI.



In terms of the Sterling-Euro **exchange rate**, during the timeframe of the current strategy the pound fluctuated versus the euro falling 16% from a high in 2016. This has led to an enhanced value for money proposition and improved overall competitiveness. Whilst rallying post-Brexit, in the medium-term Sterling is predicted to lose 5% in value against the euro; providing a possible further incentive for ROI residents to consider Northern Ireland as a holiday destination.

How **Brexit** shapes the ROI consumer mindset is yet to play out – however initial research indicates that there is a lack of consumer understanding of the implications of Brexit for travel from the ROI market into NI. It will be important that the impacts of Brexit, perceived and real, for the ROI consumer are closely monitored.

Brand Factors

A critical factor in the performance of Northern Ireland now and into the future is the overall perception of the destination brand. The last decade has seen a major transformation in Northern Ireland's overall tourism offering and a significant increase in the overall visibility of the destination within ROI.



Based on consumer research conducted to support the development of the new strategy for the ROI market, it is apparent that the Northern Ireland brand has been building momentum and increasing traction within the ROI market.

The development of the brand has been supported by effective communications. Over the period 2017 to 2019 there was a 36 percent increase in campaign spend (by Tourism NI) and there is a long-term trend of improving the impact of communications within the ROI market. Data would also indicate that the Embrace a Giant Spirit experience brand is also gaining traction within ROI, driving overall interest in Northern Ireland.



However, while the momentum of the Northern Ireland brand is positive, there is still a number of barriers to be overcome.

The key issue remains knowledge of Northern Ireland as a short break/holiday destination. Broadly there is an underlying lack of understanding of what Northern Ireland has to offer; specifically for short breaks. This in turn limits the overall relevance of Northern Ireland as a destination and the ability/confidence of the ROI consumer to plan and book a trip.

Furthermore, sporadic negative news stories continue to undermine the overall destination brand. Misconceptions remain regarding personal safety and the degree to which ROI visitors will be welcome; particularly for those who have not experienced Northern Ireland.

Competitive factors

Over the past four years research would indicate that the overall profile of Northern Ireland has improved significantly in its own right and relative to its key competitor, namely ROI itself. Based on recent research, the destination brand performs as strongly as ROI on key factors that influence the choice of a holiday/short break destination for ROI

consumers, e.g. offering a range of activities, great nightlife, unique experiences.

In addition to this, **46% of ROI consumers** who have taken a break in Northern Ireland indicated **it met their expectations**, with a further **41% stating it exceeded their expectations**. This in turn feeds positive word of mouth that is enhancing the overall brand profile.

However, it is also important to note that a key basis for competitive advantage, the perception of value for money, has weakened since the 2016 strategy was put in place. This is not to say that Northern Ireland is perceived to offer poor value for money - rather, it is not seen to be any better or worse than the value offered in ROI.



Perhaps the key measure of competitiveness is overall market share. The period 2016 to 2019 saw Northern Ireland grow its island of Ireland market share of overnight trips from 4.6% to 6.1% and share of expenditure from 4.5% to 7.1%. While this is impressive growth, from a competitive perspective there remains a huge portion of the overall island of Ireland market that Northern Ireland can compete for.

Consumer factors

From a consumer perspective, industry feedback would indicate that the consumer segmentation strategy that was established in 2016 has served as a strong focal point for focus and execution with respect to the ROI market.

Additionally, the prioritisation of particular segments has driven the efficacy and impact of communications, both in terms of

media buying and creative content. Set against this background, it will be important that consumer focus, understanding and insight is maintained, if not further enhanced in the future.

Thinking more broadly about the ROI consumer, research indicates, from a knowledge point of view, that ROI consumers fall into three categories. These are set out as follows:

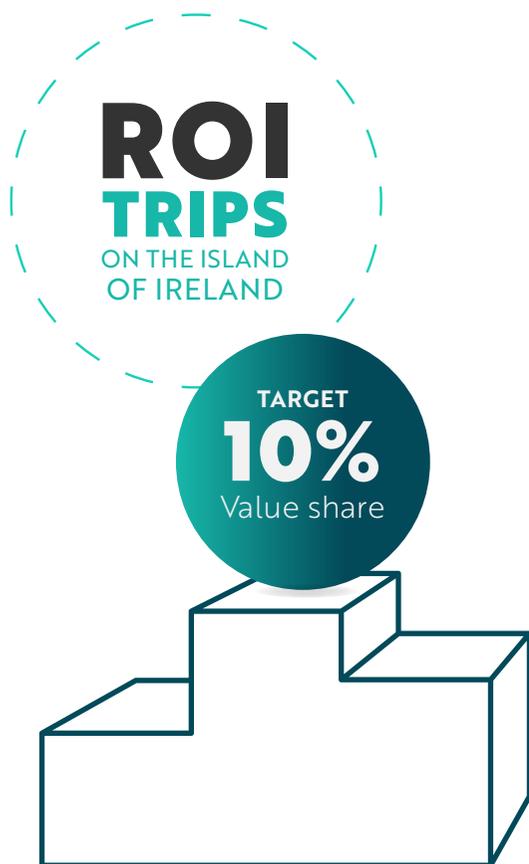
1. Those who have **little knowledge** and **limited experience** of Northern Ireland. For these consumers the past dominates thinking and perceptions. These people are quite unsure of what's actually offered and available for short breaks in Northern Ireland.
2. Those who are **building knowledge**. These people are in the process of building a new understanding of what Northern Ireland has to offer. They are focused on hero attractions. Communications are starting to cut through, and interest in considering and exploring options for short breaks is starting to be piqued and moving towards active investigation.



3. Those **with knowledge and experience** of Northern Ireland. These people feel as if they have discovered something others are yet to realise, and they feel quite special and think they are leading the way in this regard. They are often advocates for Northern Ireland amongst their peers.

In thinking about driving growth from the ROI market, each of these consumer types need to be addressed. It will be key to continue to build knowledge, provide compelling reasons to go and leverage the goodwill of those who have experienced Northern Ireland and are positive about it as a holiday destination.





2. What are we seeking to achieve?

The headline target for Northern Ireland tourism in 2026 is to win **10 percent value share of ROI trips on the Island of Ireland**. This equates to:

This equates to:

- **£193** Million **value**
- **1.08** Million **trips**
- **2.65** Million **bed nights**

Based on Central Statistics Office (CSO) Household Travel Survey data, over the lifetime of the previous strategy (2016 – 2019) the value of ROI tourism on the Island of Ireland grew from **£1.6 billion to £1.9 billion** (+6.1% compound annual growth rate - CAGR). In real terms the value won by Northern Ireland grew from **£75.5 million to £143.8 million** over this same period (+24% CAGR). Northern Ireland grew market share in a growing marketplace, moving from a share of **4.5% to 7%** from 2016 to 2019.

Out to 2026, the overall value of ROI tourism on the Island of Ireland is difficult to project and predict due to underlying market uncertainty. However, using recovery to 2019 value levels as a baseline (€1.930 million) winning **10% value** will equate to **£193 million** (+€47.2 million and +7.6% CAGR from 2022 to 2026 assuming baseline recovery in 2022 of €143.8 million).

The share of value and profile of business targeted for 2026 correlates with an objective of securing 2.65 million bed nights from ROI visitors in 2026.

OUR SEGMENTATION STRATEGY

Priority Segments:

ACTIVE MAXIMISERS | INDULGENT RELAXERS | OPEN-MINDED EXPLORERS

ACTIVE MAXIMISERS (33%)

- Youngest segment although significant number (57%) will have young children
- Like to have planned and packed itinerary
- Looking for a great destination and will plan around that
- Looking for energetic experiences, unpredictability
- Seeking night life, buzz but also romantic destinations
- Active on social media and like to share holiday online

CULTURE & CONNECTIONS SEEKERS (20%)

- Most likely segment to be interested in arts, culture and food
- Motivated by the opportunity to spend time with family or friends on short breaks
- Although older still motivated by energetic and outdoor activities
- Older segment - more likely to be thinking about safety (personal and health) than other segments - need reassurance

GOOD TIME FAMILIES (8%)

- Interested in a variety of things - seeking to get the best from their breaks
- Want to enjoy good food and drink
- Like to interact with locals
- More likely to take multi-generational breaks
- Like to research their trips thoroughly and uncover hidden gems
- Bigger spenders but focused on getting a good deal

INDULGENT RELAXERS (11%)

- Most likely segment to take a 'romantic' break as their next break
- Motivated by the opportunity to spend time with family or friends on short breaks
- Prefer to stay in large comfortable hotels
- Like to 'indulge' themselves when on a break
- Enjoy good food and music
- Interested in shopping opportunities while on a short break

OPEN-MINDED EXPLORERS (15%)

- Interested in the natural environment, scenic attractions
- Motivated by culture and are seeking unique experiences
- Food very important and highly motivating for them
- Want high quality accommodation
- Older segment - concerned about their personal safety and health
- Want good value for money

OPEN-MINDED FAMILIES (13%)

- Motivated by natural environment, scenic attractions
- More likely to stay in a variety of different accommodation types
- Motivated by history and culture and are seeking unique experiences
- Looking for a variety of activities to suit all members of the family
- Interested in gentle/relaxing outdoor activities

3. Who are we targeting?

A clear focus on and insight into the consumer will be core to guiding and focusing future strategic efforts. A core part of developing the future growth strategy for ROI revolved around reviewing the existing segmentation strategy and generating a new and deeper insight into the consumer landscape within ROI and the segments that make it up.

Segmentation – a story of evolution

Following a comprehensive review of the ROI market a new segmentation solution has been established, one characterised by evolution rather than revolution. The new segmentation model identifies six potential segments, three of which have been defined as priority segments. These three segments represent the best opportunity to drive tourism growth from ROI into NI.

A summary of the new segmentation solution is detailed on the left. In terms of identifying the key shifts in the segmentation solution from what was previously in place, the key changes are as follows:

- There is a dramatic shift in the number of Active Maximisers (from 10% to 33%), with a greater prevalence of young families within this segment.
- There is significant growth in the Culture & Connection Seekers (from

4% to 20%) and these have been renamed (from Connection Seekers) to include and acknowledge the growth of their interest in the cultural dimensions of a short break.

- All segments now demonstrate a greater interest in the outdoors and engaging in activities.
- There is a stronger presence of 'family' as a defining characteristic within the segmentation strategy.
- In the short-term, concerns about Covid-19 and health will be key influencing factors with older consumers who are much more cautious about travel.



Priority Segments - Who do we want the most?

Although there are no segments that Northern Ireland does not want, there are some that the tourism sector wants to attract more than others. Based on an evaluation that includes the key segment factors of value, volume, conversion efficiency² and travel comfort³: The priority segments have been defined as follows:

	SEGMENT	PRIORITISATION
<p>Volume</p> <p>Value</p> <p>Conversion efficiency</p> <p>Travel comfort</p>	1. Active Maximisers (33%)	Key foundational value and volume builder segment in short and longer term.
	2. Culture and Connection Seekers (20%)	
	3. Good Time Families (8%)	
	4. Indulgent Relaxers (11%)	Highest propensity to visit NI in short term. Short term opportunity to win, adding efficient value to the industry. Overtaken by other segments in the longer term, and likely to return to overseas travel.
	5. Open-Minded Explorers (15%)	A high value segment of interest that steadily grows in importance for efficient value and volume over time.
	6. Open-Minded Families (13%)	

It is therefore recommended the priority segments for the ROI market are Active Maximisers and Open-Minded Explorers in the short, medium and long term, and Indulgent Relaxers in the short term. These are the segments that will be front of mind in the design and execution of all key strategic efforts.

Winning with priority segments – key areas for focus

ACTIVE MAXIMISERS	INDULGENT RELAXERS	OPEN-MINDED EXPLORERS
Demonstrate NI's capacity to deliver a range of action packed, diverse and unique experiences.	Harness the latent demand for indulgent / high quality pampering breaks and experiences.	Focus on segment's desire for learning and new experiences by promoting the best of Northern Ireland's outdoor (natural beauty), cultural and food offering.
Nuance offering for this segment for those who are pre-family and also those with young families.	Amplify the quality of NI's food, shopping and night-time offering.	Emphasise the NI 'welcome' and opportunity to engage with local people and culture.



²Conversion efficiency: the relative ease of driving new business from any single segment based on the underlying appeal of Northern Ireland and the segment overall value and volume.

³Travel comfort: comfort taking short breaks based on Covid-19 health and public health measures.

4. How will we compete and win? Our Strategy

In developing the strategy for growth, three strategy pillars have been established. These will act as key areas of focus, guiding decision making and informing the actions that will be taken to drive and sustain growth from the ROI market. The three pillars are detailed as follows:

Collective Effort - Industry Engagement and Development

Developing and supporting a motivated, engaged, connected and committed industry that is focused and equipped to win in the ROI market.

Compelling Communications - Powerful messaging

Delivering consistent, connected and motivating communications that builds knowledge of what Northern Ireland has to offer and clear and compelling reasons to go.

Constant Purchasability – Maximising conversion

Creating the conditions through which compelling and connected short break propositions (accommodation and attractions) are easily accessed and purchasable.



Collective Effort - Industry Engagement And Development

In order to achieve the scale of ambition and deliver the levels of growth targeted it will be critical that industry is highly motivated, consistently engaged and committed to winning within the ROI market. In the short, medium and long term the ROI market must be viewed as a key priority, driving sector recovery and sustained growth in the future.

Ultimately, it should be the industry that has the capacity to drive the strategy in the long term by being coherent in their communications, devising offers that resonate and delivering quality experiences. The recent performance and growth delivered from the ROI market has demonstrated Northern Ireland's ability to execute a well-focused and high-impact strategy in the ROI market. Looking forward, it will be imperative the tourism industry in Northern Ireland is empowered and acts in unison to rebuild the momentum and traction that was present in the ROI market prior to the global pandemic, and then sustain performance in the future.

In order to foster and support the collective effort that will be required

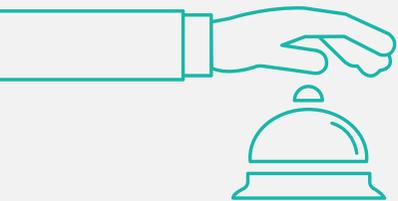
to maximise industry impact in the ROI market, the following key initiatives should be implemented.

Devise, deliver and sustain a specific industry engagement platform centred on the ROI market

As this strategy is rolled out, it will be important the industry is engaged early and often with respect to the ROI market. A key initial focus will be to building awareness of the market opportunity and foster the ambition to succeed. An effective launch of the strategy, including a supporting webinar and the development of a playbook/toolkit for execution will be vital to ensure the strategic intent and focus is embedded early and understood consistently by all key stakeholders and actors.

Develop and enhance consumer segment understanding

It will be imperative that the majority, if not all, strategic efforts are informed by segment understanding and focus. Applying the segmentation solution will be a consistent and highly influential dimension of how Northern Ireland will think about and address the ROI market – the intent and requirement is to be completely consumer-focused, putting them at the centre of decisions and actions.



In order to achieve this, an industry understanding of the key market and segment characteristics and the overall playbook for the ROI must be embedded via the development of relevant, accessible resources and supports. Furthermore, as the strategy is rolled out, key learnings and insights that arise relating to key segments should be developed and then shared at an industry level, ensuring ongoing engagement and learning with respect to the ROI market and consumer.

Prioritise 'hospitality' as a key industry development focus

While other skills need to be developed and enhanced, such as digital, CRM capabilities, marketing etc. a primary focus will be on developing industry capabilities and mindset in the context of how frontline people will interact with ROI visitors. The primary objective will be to ensure the ROI visitor feels welcome and valued (even before they come) and ultimately see the people of Northern Ireland as the key highlight of their trip.

While one can assume there will

be effective communications and continued development of excellent product, the Northern Ireland destination brand must be built from the 'inside out' and delighting ROI visitors on the ground will be key to long term success.

Underpinning the above will be the sector's capacity to recruit, train develop and retain talent. Tourism is ultimately a people business and it will be critical that attracting the right type of talent and ensuring they are trained to a high standard is an ongoing focus for NI and its industry. Embedded in training and skills development should be a focus on the key ROI segments, building an appreciation of how to best engage



these key segments and deliver on their needs and motivations in terms of staff behaviour.

Understand the competition – achieving parity, superiority and differentiation

From an industry development point of view, it will be important that not only an appreciation of the consumer is built, but also an understanding of the competitor is established.

Set against this background there will be a focus on facilitating NI industry to develop an understanding of the products and experiences it must win against (rivalling the ROI domestic offering).

This insight into the key competitor will be built through learning journeys to ROI. Arising from these learning journeys, development plans will be devised in conjunction with participating industry partners. It will be the aim of these development plans to ensure that Northern Ireland's offering and the experience it delivers achieves, at a minimum, parity to what is offered by ROI but also identifies means to generate superiority and differentiation relative to ROI – thus creating a basis for potential competitive advantage.



Compelling Communications - Powerful Messaging

The capacity and ability of Northern Ireland to effectively and consistently communicate to the ROI market will be fundamental to future success and growth.

As previously outlined, research tells us that while the overall knowledge base with respect to Northern Ireland is developing, in large part there is a weak understanding and appreciation of what Northern Ireland has to offer as a holiday destination. It is therefore imperative that sustained investment is made in building the destination brand, positioning it in a manner that is compelling and provides clear 'reasons to go' to Northern Ireland. In the context of the above key initiatives for implementation are detailed as follows:

Continued development of the Embrace a Giant Spirit experience brand

Research conducted prior to and during the development of this strategy consistently indicates that the Embrace a Giant Spirit experience brand is building traction and having a positive impact on the positioning of Northern Ireland as a short break / holiday destination.

While, in truth, still in its infancy (with awareness levels of 26 percent in the ROI market) the Embrace a Giant Spirit experience brand is beginning to establish itself as a 'big brand idea', upon which knowledge of Northern Ireland and its offering can be built and developed. The continued development of Embrace a Giant Spirit as the singular big brand idea and platform through which Northern Ireland is consistently positioned and promoted will be a priority focus in terms of future communications efforts. With this in mind it is recommended that industry develops its communications so that they are connected to the Embrace a Giant Spirit brand. Additionally, it will be vital that the Embrace a Giant Spirit brand is flexed and is multi-faceted with nuances to messaging being influenced by key segments in particular.



Highlight major and unique attractions / offerings

Given the point of development of the Northern Ireland brand in the ROI market, and the necessity to continue to build knowledge and provide compelling reasons to consider and choose NI as a holiday/short break destination, it is recommended that in the near-term communications primarily focus on major attractions and experiences while also overlaying these key 'hooks' with the integration of new and immersive experiences that bring 'new news' to the ROI consumer.

The strategy will be to play to current brand strengths where ROI has some knowledge of the NI offering, build upon this knowledge and, as a result, drive NI further into the consumers' consideration set. In tandem with this, the uniqueness of NI's offering (relative to ROI) should be highlighted and reinforced through communications as well as new news in terms of product and experience.

The above efforts must be supplemented by a more focused effort on the development and presentation of itinerary examples that have the capacity to move the consumer along the purchasing journey to active consideration and booking.



Focused tactical communications

In addition to brand-building communications (primarily delivered through the Embrace a Giant Spirit experience brand) it will be important that tactical communications are implemented in a timely manner based on issues or opportunities as they arise.

As Northern Ireland faces into a particularly dynamic landscape, with key factors such as perceived and real value for money, ease of travel/ access, safety, Covid-19 and Brexit in play, it will be important that communications are actively used to address these elements which have the capacity to either impede or accelerate progress and growth in the ROI market.

Joined up communications and messaging

While much of the focus will be in 'above the line', paid-for communications, and 'below the line' brand activation and selling, it will be important that efforts are made to guide and influence a holistic approach to messaging relating to Northern Ireland as a holiday destination.

This, in effect, means ensuring coherence between the communications and messaging led by Tourism NI, delivered by industry and also messages emanating from key stakeholders. It will be important that a positive presentation of Northern Ireland as a destination is consistently put forward, with key players and influencers being on brand in terms of commentary and advocacy.

In addition to the above, there needs to be a strategic focus on driving ROI visitor advocacy. Data shows that ROI visitors stated that Northern Ireland either met (46 percent) or exceeded (22 percent) their expectations (Proprietary nationally representative quantitative study of ROI market commissioned as part of the strategy refresh process). Visitor recommendations and word of mouth will be powerful drivers of overall destination profile and consideration and leveraging this goodwill will be important.

Appropriate investment

Building a destination brand is a long process and knowledge and relevance take time to develop and embed. In order to develop the required knowledge of Northern Ireland and position it as a relevant holiday destination for ROI

consumers there must be adequate investment in the brand itself. Significant and sustained investment is required to move the needle on brand (ideally facilitating 'always on' comms).

Set against this background, industry and other key stakeholders will be required to case build for investment (in communications and product/experience development) on a sustained basis. This is justified by a track record and correlation between the volume of communications and



the subsequent performance in the ROI market.

Constant purchasability

While 'Compelling Communications' will create the conditions for sale, very decisive steps need to be taken to 'fill the shelves' with segment led packages and itineraries that can be easily purchased.

In practical terms this means that hoteliers should not only be seeking to sell accommodation and food but also compelling connected experiences that have the capacity to deliver fantastic short breaks / holidays.

Similarly, experience owners or event promoters will be required to sell more than their singular experience or event and encourage the ROI consumer to do more, see more, stay more and spend more in Northern Ireland.

The primary focus will be on not only making Northern Ireland a compelling choice but also making it easy for the ROI consumer to purchase full packages of experiences that feel they have been curated with their needs and motivations in mind.

Set against this background the key initiatives for implementation have been defined as follows:



Multi-dimensional segment led holiday propositions

While communications will inspire and excite the ROI consumer, they must be supplemented by not only example itineraries but purchasable bundles of packages also. This will be manifest in the development of motivating and multi-dimensional segment led holiday propositions.

These bundles should be flexed to include a one-night, two-night and three-night proposition that encompass accommodation, experiences (day), experiences (night) and the food and drink offering.

The above will require collaboration at an industry level to develop offers – rooted in a key destination or attraction and built out as a more holistic and full offering.

Additionally, there will be a focused effort on transitioning potential day trippers to overnight visitors by simultaneously presenting reasons to visit, reasons to stay and the aforementioned easily purchasable packages.

Furthermore, efforts must be made to encourage travel and overnight stays more regionally within NI through the establishment of 'hub and spoke' bundles - attracting visitors in through leading destinations and attractions and then cascading them out through the regions.

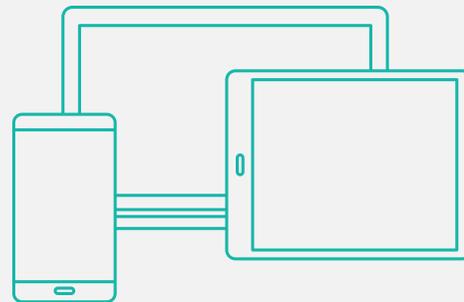


Optimisation of key sales platforms

Continued efforts must be made so that key sales platforms are optimised – direct channels, Online Travel Agents, discovernorthernireland.com, tour operators etc. as a means to present offers and convert to sales.

Set against this background a collaborative approach across all 'sellers' should be pursued to ensure that Northern Ireland's offering to the ROI consumer is coherent, visible, represents good value for money and is easily purchased.

As part of the above effort, active management of the consumer path to purchase must be put in place. The key objective will be to minimise the journey between communications and conversion to sale while also assessing traction of offers in market and enhancing / evolving these offerings as required.



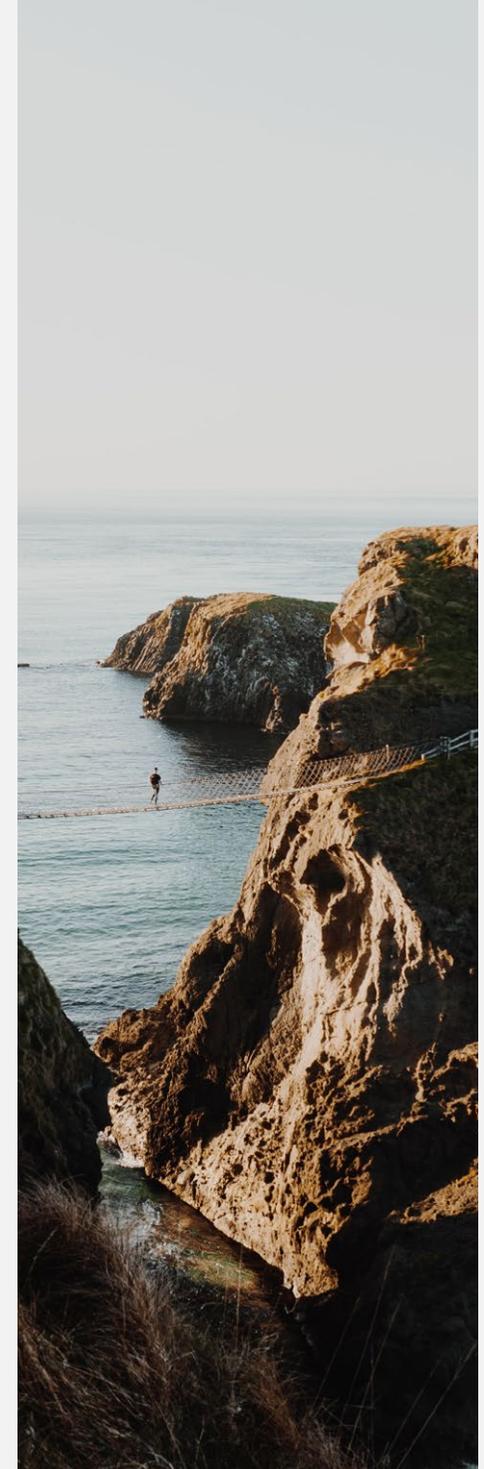
Leveraging events as a key driver and 'reason to go'

With the ROI market and priority segments in mind, festivals and events should be leveraged to drive consideration and conversion of ROI holiday makers.

The specific objective will be to use festivals and events as a platform to drive relevance of Northern Ireland as a short break and holiday destination – focusing on key segment passion points through events and festivals. The key output will be a calendar of events that is compelling, unique and motivating for ROI segments to visit and stay in NI.

Aligned with this, purchasable bundles must be layered into the promotion of the festivals and events – making it as easy as possible for key segments to choose and book short breaks in Northern Ireland.

It is however acknowledged that while one can plan for this outcome, it can only be brought to bear once festivals and events can again occur (post Covid 19). Additionally, a deeper layer of insight into the precise types of festivals and events will need to be added as a piece of additional market intelligence.



5. What will support execution of the strategy? Strategic Foundations

In support of the overall strategy there are a number of key foundational elements and principles that need to be present, sustained and indeed developed over the course of the strategy. These key foundational elements are detailed as follows:

Segment Centric Ethos

As alluded to on a number of occasions within this document, it will be critical that a segment focus is pervasive across the strategy and its implementation – this is a customer-first strategy and therefore the segments should be present and a key consideration in all decisions and actions.

Effective Strategy Management

For the strategy to succeed, all parties must play an active role in its delivery. At a high level the key stakeholders are Government/Politicians/Councils, Tourism NI, Industry (large players) and Industry (smaller high potential players). Each stakeholder must play an active and defined role and the strategy must be managed.

In summary, the recommended key roles are as follows:

Government/Politicians/Councils: fund the strategy, set the policies

required to support the success of the strategy, advocate for and promote NI as a holiday destination.

Tourism NI: case build for investment in the sector (backed by industry stakeholders). Drive and coordinate the communications strategy. Support and facilitate industry engagement and development. Engineer the overarching strategy implementation. Conduct measurement and coordinate market intelligence gathering and circulation.

Industry (large players): Delight the ROI visitor, excelling in true and unrivalled hospitality. Enhance the product and experience offering. Support the delivery of the experience brand through collaboration with industry peers to deliver compelling purchasable offers.

Industry (smaller high potential players): Delight the ROI visitor by developing and delivering unique, authentic and innovative experiences that are aligned with the experience brand and provide new and fresh 'reasons to go' and drivers of consideration of Northern Ireland as a short break / holiday destination.

Actionable Market Intelligence

While retrospective performance metrics will continue to be key (volume, value, brand tracking etc.) it is recommended that a future focused market intelligence strategy



is designed and delivered.

This strategy will specifically seek to gather consumer insight that will inform and guide future decisions and actions as they relate to communications, sales propositions, channel utilisation and product/ experience innovation.

This will require a more dynamic approach to research, data, and insight including consumer panels and structured consumer co-invention (in addition to monitoring consumer sentiment and brand tracking etc.)

Ongoing development of sustainability credentials

The importance of sustainability and eco credentials for the sector are only set to increase in the future. It will be vital that sustainability and the environmental impact of the sector is a key consideration in the development and delivery of Northern Ireland's tourism offering to ROI consumers. These efforts should seek to position Northern Ireland as a leading and proactive destination in the context of sustainability while also supporting the wider regenerative tourism strategy.

6. How will we measure progress? Key Metrics

In terms of measuring performance specific targets have been set across the three areas below:

1. Hard commercial metrics
2. Brand, marketing and customer funnel metrics
3. Industry development and connection metrics

These metrics are interconnected and based on the strategic plan. They will ensure focus on the primary areas of importance within the strategy that will drive sustained growth and development of Northern Irish tourism from ROI.

1: Hard commercial metrics

As previously detailed in this document the headline target for Northern Ireland tourism in 2026 is to win 10% value share of ROI trips on the Island of Ireland. This equates to:

- **£193 million value**
- **1.08 million trips**
- **2.65 million bed nights**

These targets will be translated into annualised growth figures and measured through statistics generated by NISRA and the CSO.



2: Brand, marketing and customer funnel metrics

In addition to the hard metrics, the strategy must also focus on developing the overall (brand) profile of Northern Ireland as a holiday destination, with metrics relating to advertising recall, Embrace A Giant Spirit awareness and consideration of Northern Ireland for a break. The headline targets for 2026 are:

- Awareness of Embrace A Giant Spirit at or above 60%
- Intention to take a break in Northern Ireland in next 3 years at or above 70%

At the end of 2020, Embrace A Giant Spirit experience brand was at 26%. It is important to continue to build this platform into a well-established and consistent lens through which ROI residents understand what Northern Ireland has to offer. This will support marketing effectiveness and destination consideration while also creating tangible reasons to go by driving the connection between itineraries and the Embrace A Giant Spirit brand. Driving awareness will be contingent on consistent investment at required levels in marketing communications, combined with effective creative development and media planning. The overall target

for 2026 is to have a 60% awareness of Embrace A Giant Spirit among all Irish adults, with an over-index on priority segments identified within this strategy.

The target metric for 2026 related to building the sales funnel is to focus on intention to visit Northern Ireland for a break in the next 3 years. This is a strong proxy for openness to engaging in active search and booking. In 2016, intention to take a break in Northern Ireland in the next 3 years was 56%, and in 2021 this was at 54%. The target for 2026 is to get this metric to 70% or higher for all Irish adults with an over-index on priority segments.

These brand and consideration metrics will ensure that active consideration is being built in addition to Embrace A Giant Spirit awareness, and, as such, brand building and more focused building of sales pipeline are being developed by marketing efforts. It will then be a job for industry to convert this improving funnel.



3: Industry focus and collaboration

Through the strategy we are seeking to build industry focus and collaboration within the ROI market – ensuring industry drives performance by taking an active and connected stance in terms of their investment and business development focus on the ROI market. What this means in practical terms is:

- Industry developing product and experiences that are connected to, and fit with the Embrace A Giant Spirit platform to drive connected itineraries.
- Industry are actively building local connected itineraries and are both encouraging and actively cross selling complimentary experiences/services.

To measure this industry collaboration, an industry-wide survey should be conducted to capture baseline performance on key indicator metrics in early 2022. These metrics will be then tasked with a +30% indexed growth target by 2026.

This measurement will monitor and encourage greater alignment between the Embrace a Giant Spirit brand and the actual industry offering.

Strategy Governance

As part of the implementation of the new ROI strategy it has been agreed that the Steering Group who oversaw the strategy development will remain in place and meet to review progress in terms of implementation on a bi-annual basis.

7. Where to from here?

Everyone within our tourism sector will play a vital role in building NI's appeal and driving growth from the ROI market. It is through our individual and collective efforts that we will build and sustain the NI destination tourism proposition – driving growth and a sustained performance in the ROI market that creates both economic and social value.

NI has a proven ability to compete and win in the ROI market. As our new norm emerges now is the time to re-focus our efforts on the ROI market and deliver growth beyond what we have achieved in the past.



Republic of Ireland Market Strategy

2021-2026

Strategy Reporting Document