

Domestic Market

Your Key to Recovery

Northern
Ireland
Embrace
a Giant
Spirit



Northern
Ireland

Industry Webinar
July 7th 2020

TED

Tourism
Enterprise Development
Programme



tourism
northernireland



Welcome

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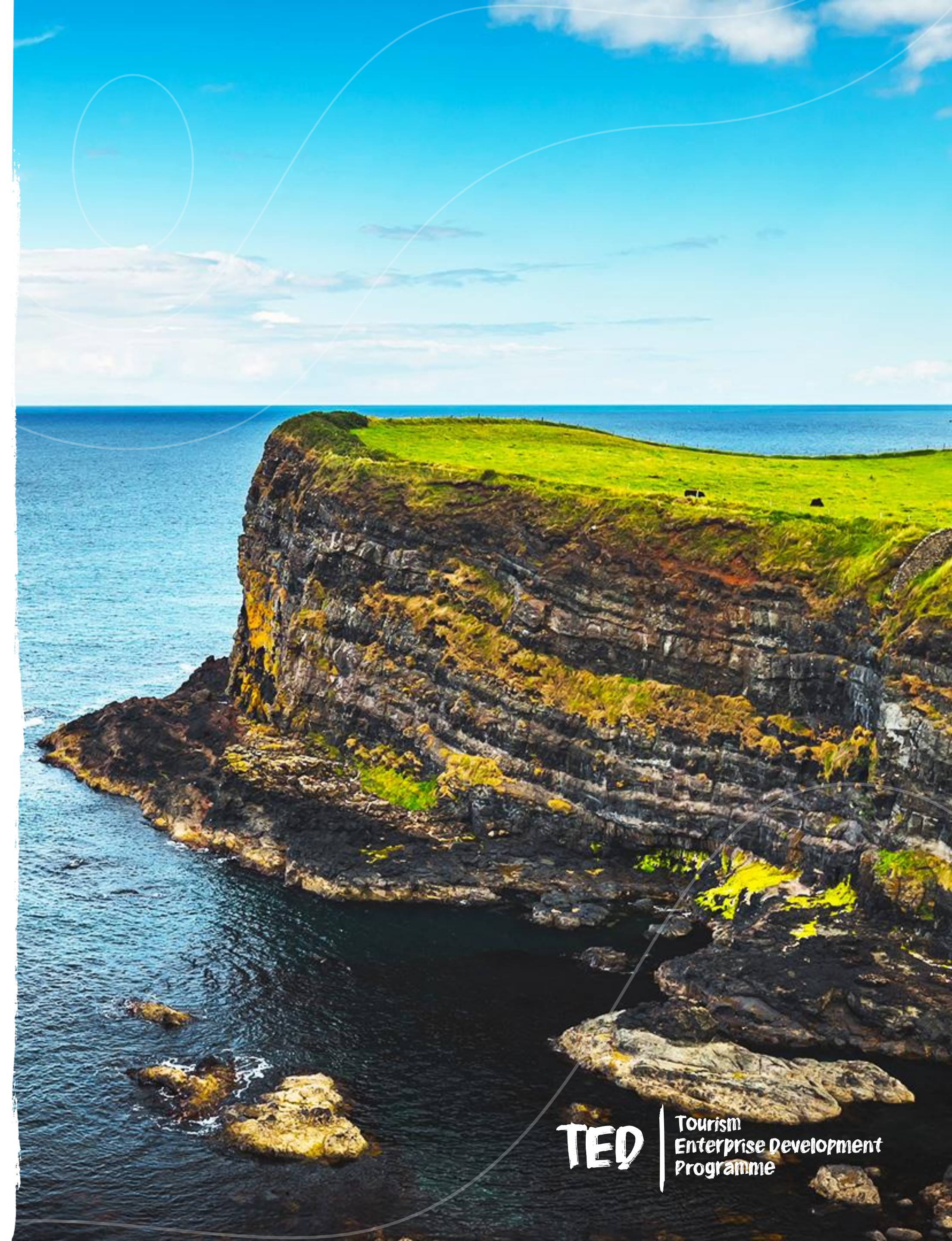


The purpose of today's webinar

- 1** To understand the importance of the Domestic Strategy for your business/organisation and challenges of operating in the “New Normal”
- 2** To demonstrate how the Domestic Market Strategy and Action Planning process relates to other key NI Recovery Plan initiatives
- 3** To unpack and share more detail of the new approach to ‘action planning’ which has been designed to bring the strategy to life at an industry level
- 4** To set out the Next Steps and how to engage in the process

Context to Action Planning

The “New Normal”



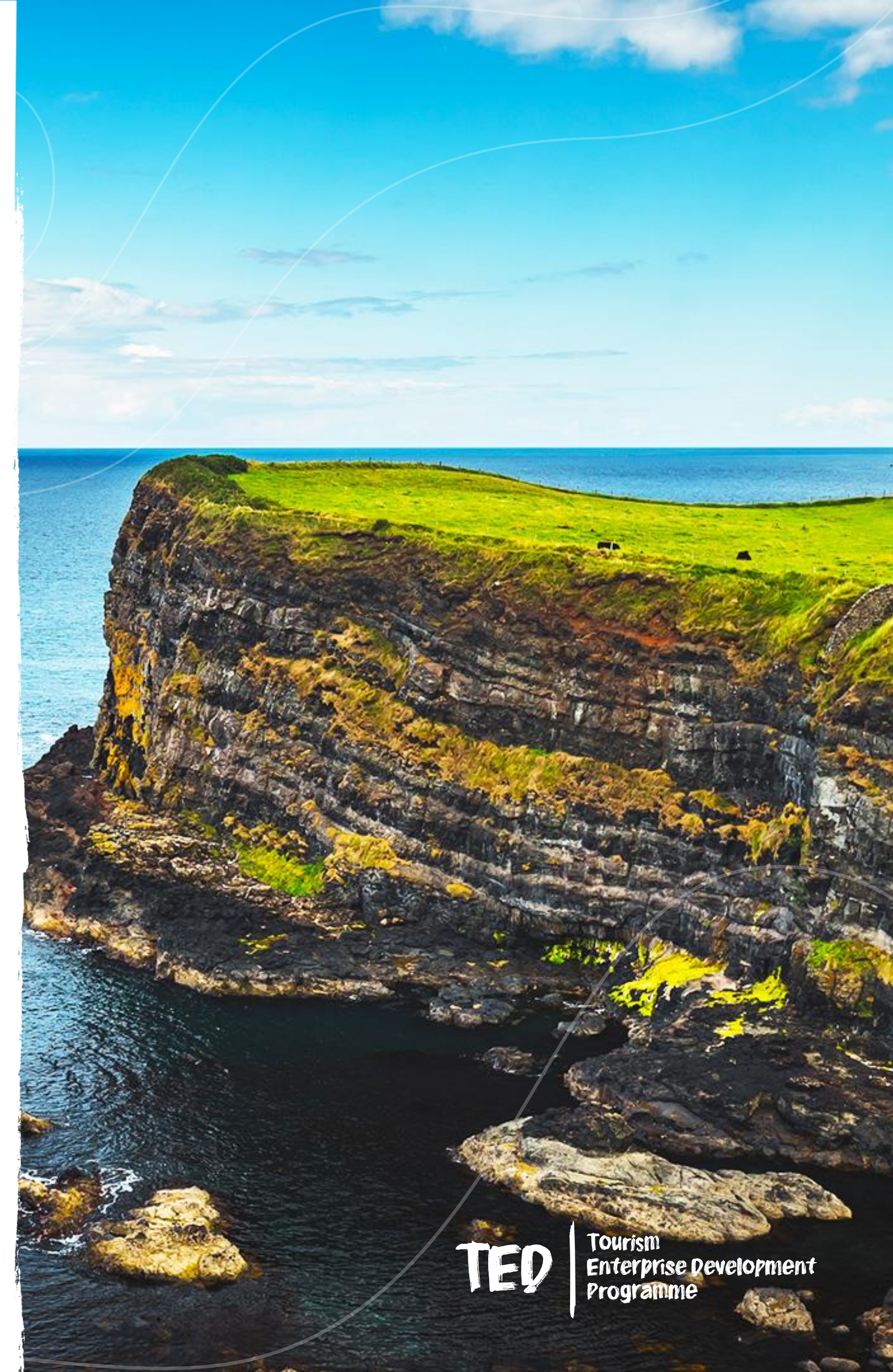
Importance of Domestic Market for you....

- My business needs to enhance my offer for an established domestic market
- My business needs to Pivot in the short term from an international visitor focus
- My organisation works with tourism businesses/clusters who need to work collaboratively to harness domestic market to drive the local visitor economy



Key Challenges

- Ability to operate an immersive experience commercially within the new guidelines
- Uncertainty about future visitor numbers
- Planning Staffing levels/furlough issues
- Impact on cashflow
- Return on Marketing investment
- How will my business model have to change in the short term/medium term and longer term

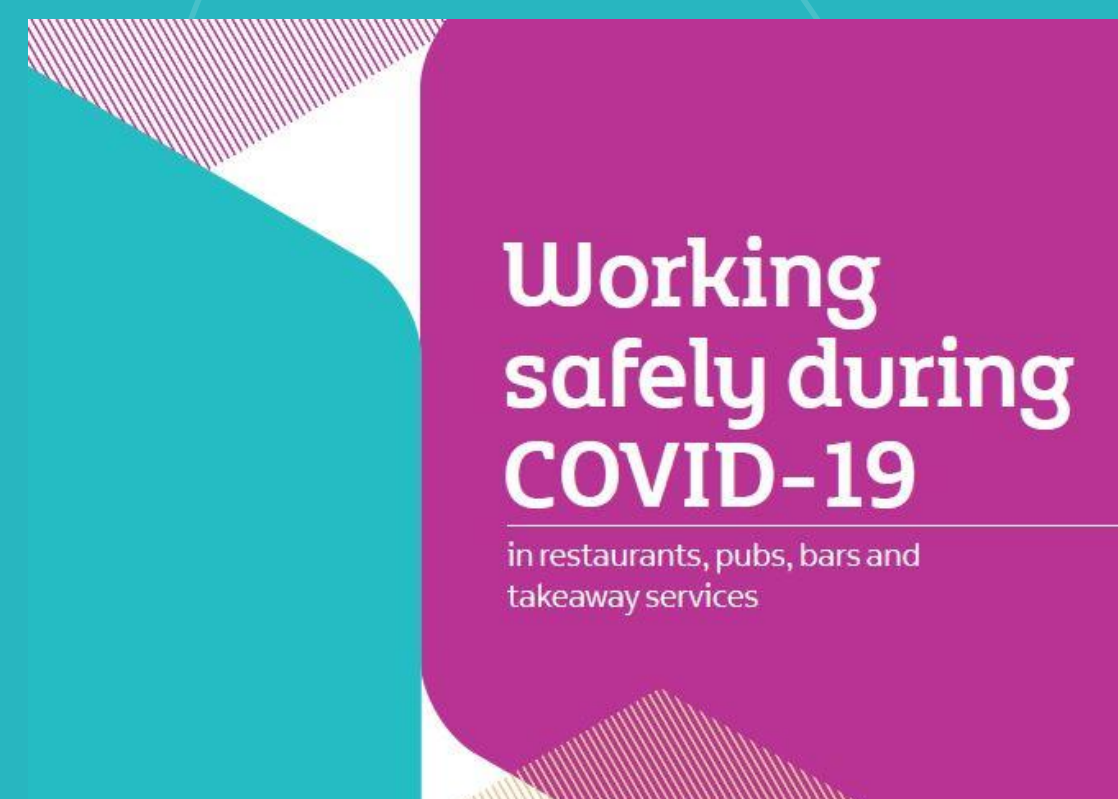
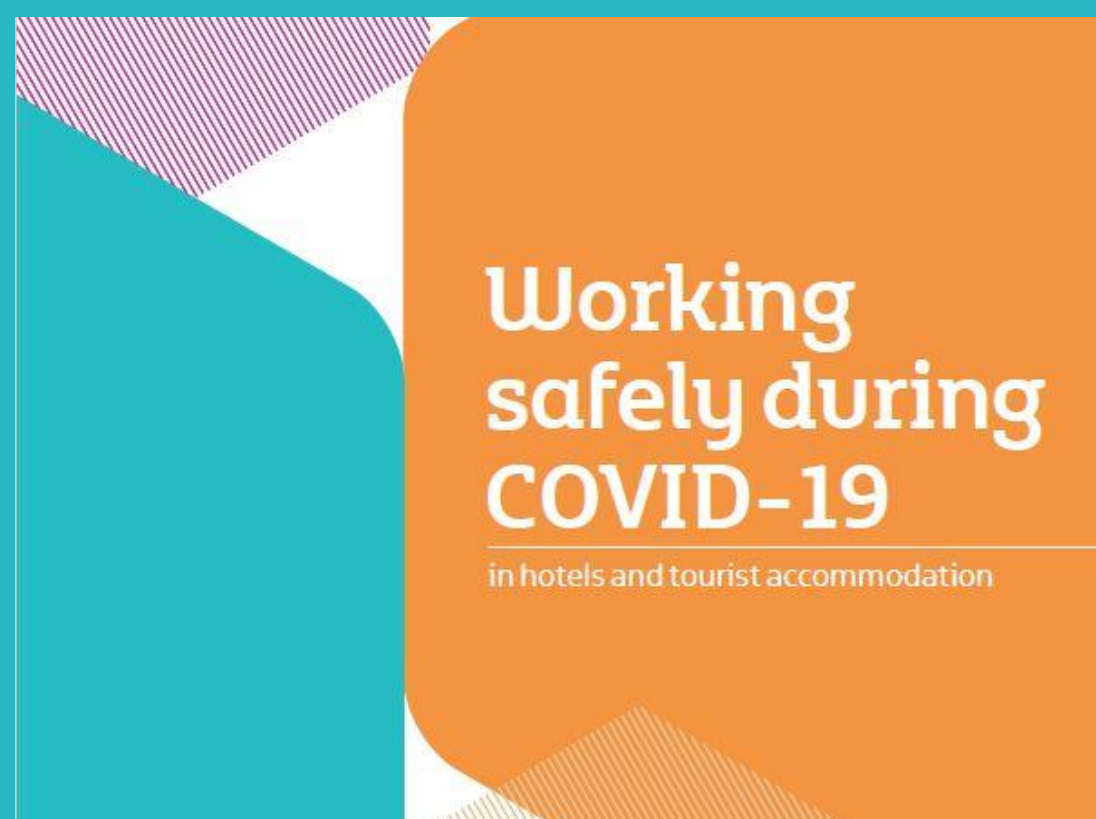


Navigating the guidance

General Guidance Working safely during COVID-19 in the Visitor Economy

Accompanied by 2 specific sector documents:

- Working safely during COVID-19 in hotels and tourist accommodation
- Working safely during COVID-19 in restaurants, pubs, bars and takeaway services



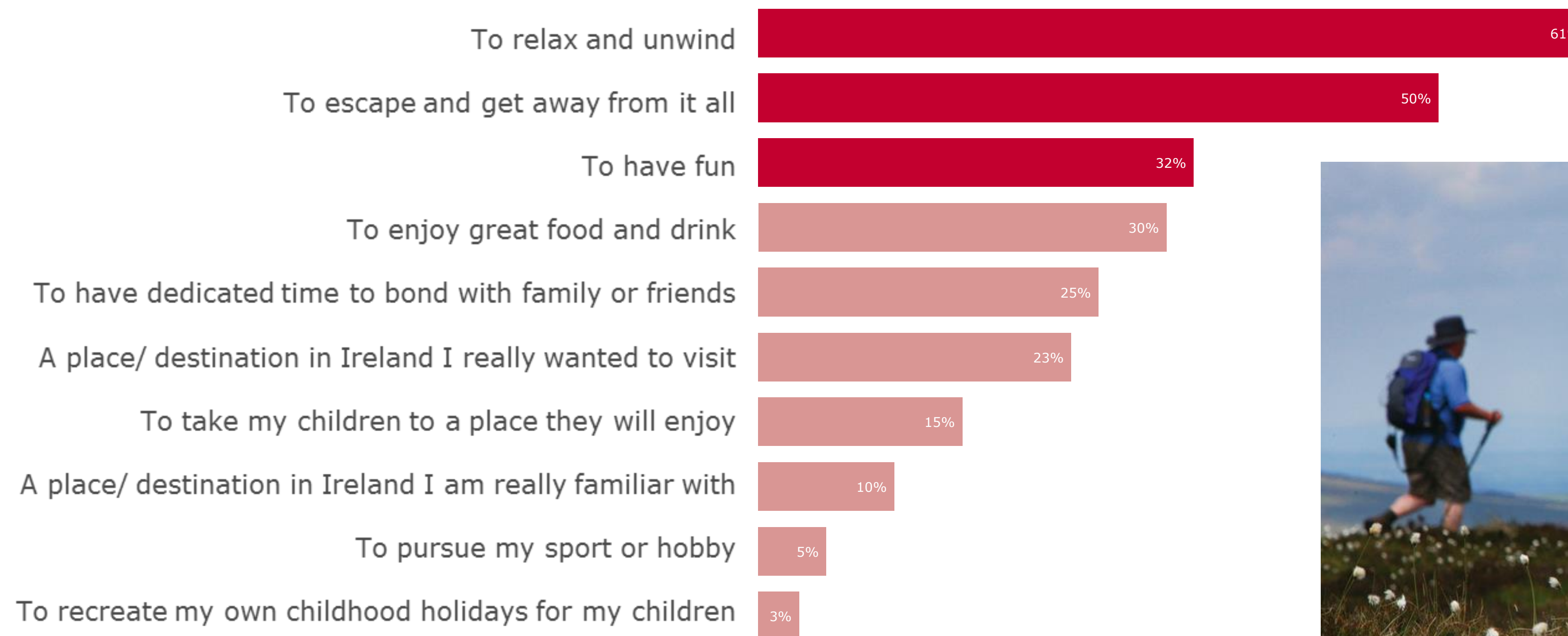
Consumer Trends

- Focus on local – food and drink
- Environment & Sustainability
- Health and well-being
- Family and friends
- Connect with nature
- Other related to your sector?

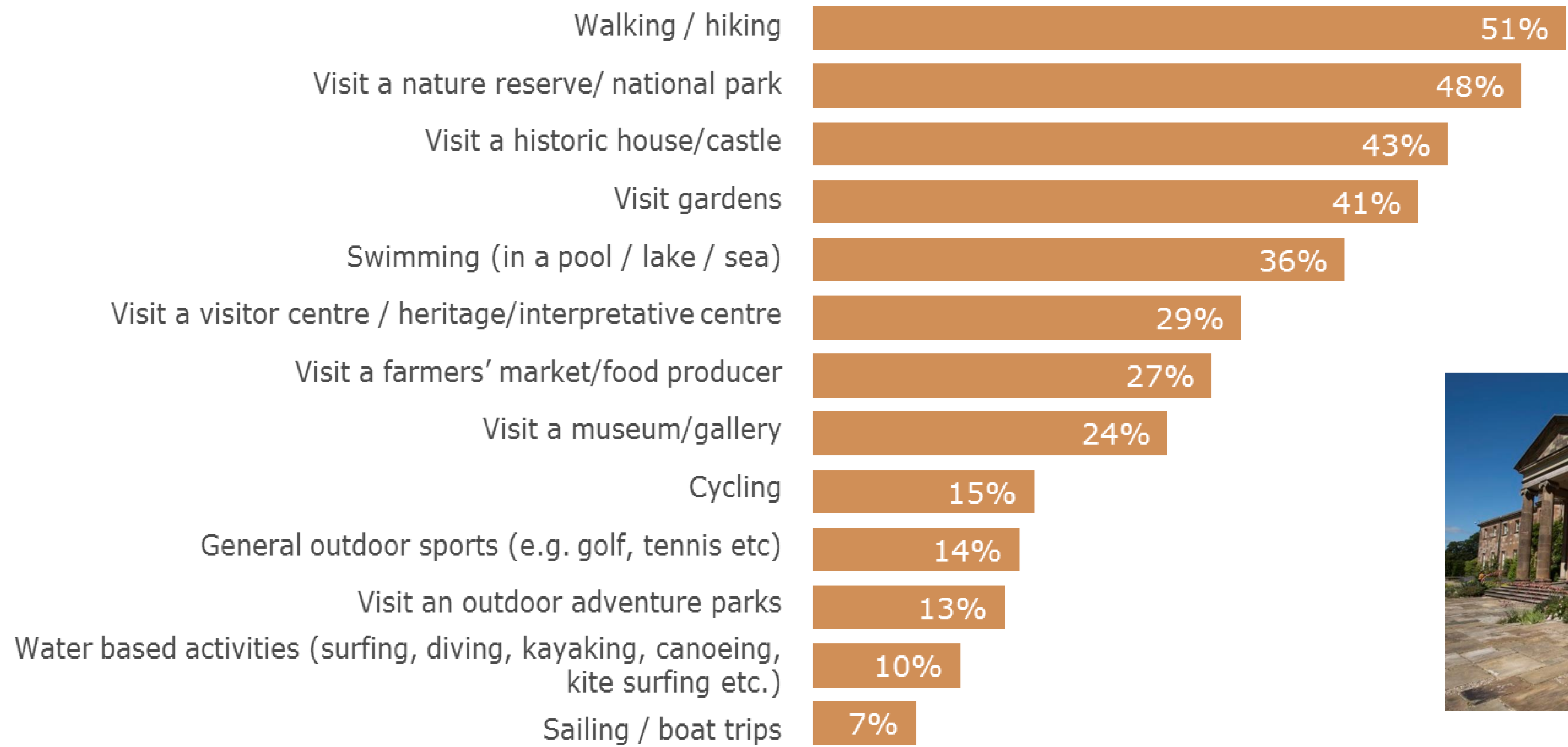


Consumer Sentiment

The most important reasons for taking a trip for consumers are



What will they want to do?

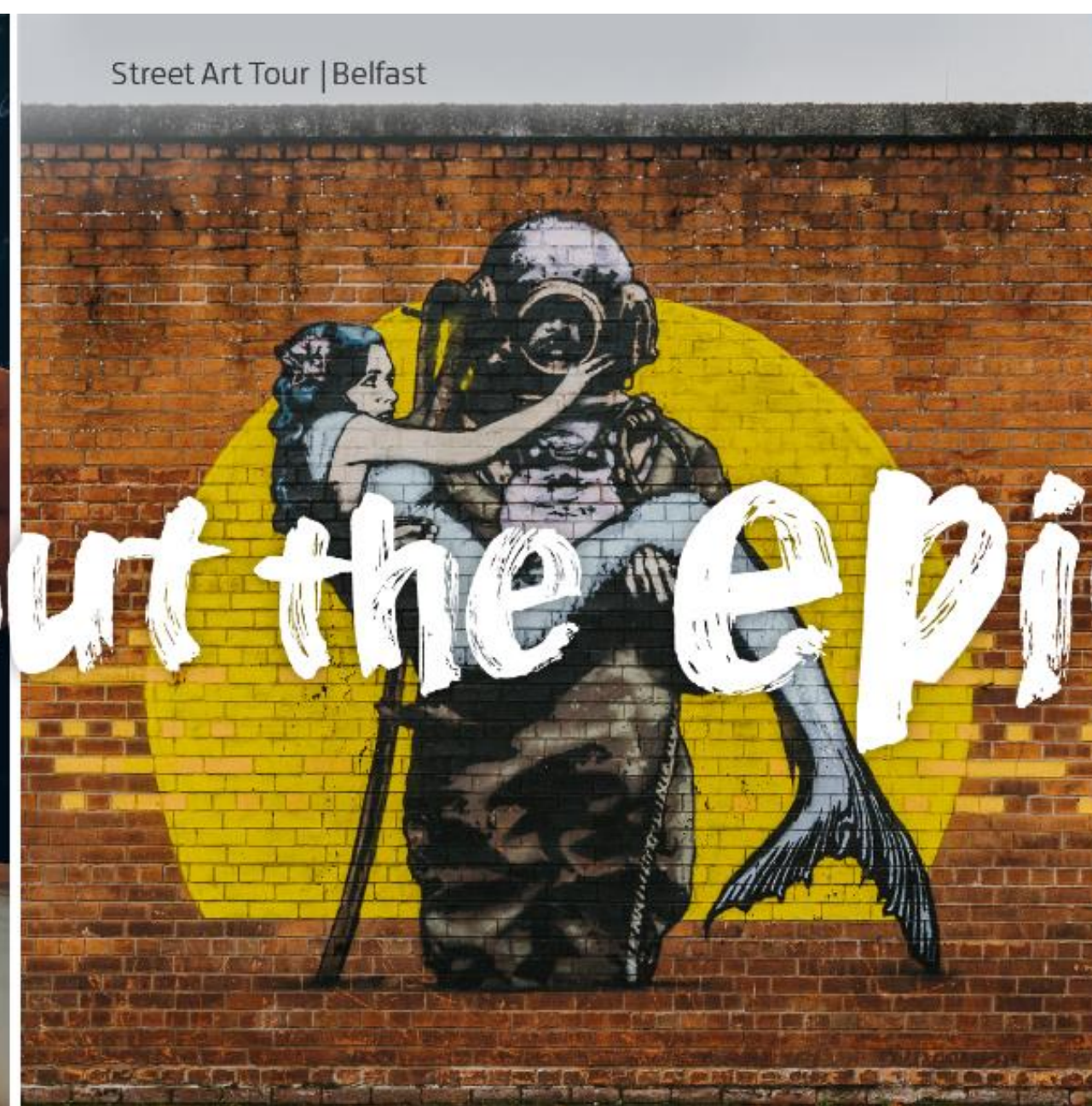


August and September are popular intended months to take a trip – indications are that the shoulder season will be popular

Recovery Marketing Plan

- To inspire people to “staycation” at home
- To embrace Northern Ireland’s Giant Spirit
- Epic Fun without the Epic Trek
- Cooperative Marketing Fund
- Highlight the warmth of welcome, world-class food and drink, beauty of landscapes, immersive experiences
- Safety focus “Good to Go” Industry Standard
- experiences
- Consumer research will inform marketing tactics
- Mix of digital, outdoor, radio, press, tv, supported by PR and media visits
- Create the best prospects for immediate bookings







Going for Growth

Scale of ambition to 2030

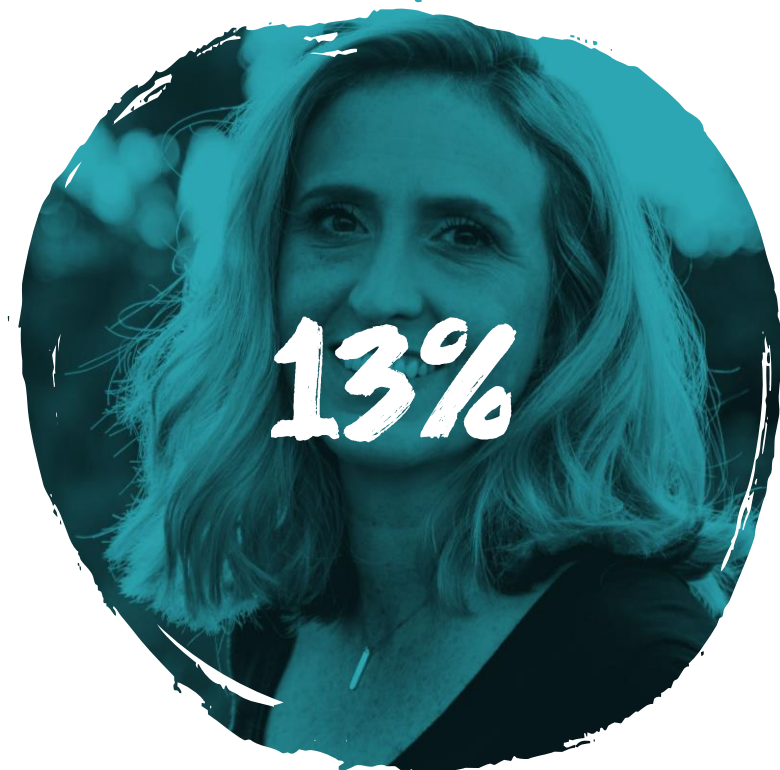
24% growth in trips

2% growth per annum

31% growth in spend

2.5% growth per annum

Domestic market segmentation strategy



Comfort seekers

"I know what, I like and I like what I know."



Pragmatists

"Breaks are important but you have to be sensible with your decisions."



Aspiring Families

"It's all about connecting with the kids – proper family time and experiences."



Short Break Enthusiasts

"I'm passionate about travel. There is so much to discover and experience."



Natural Quality Seekers

"There is nothing better than staying in a beautiful place being surrounded by beauty."



Social Instagrammers

"You gotta get out there and see what's happening, get to the heart and buzz of it."

Consumer and Brand Context

NI brand strong...

Northern Ireland viewed as positively as the Republic of Ireland and has a stronger profile than Great Britain

Perceived 'value for money' a key image driver

Good momentum...

Interest, intent and Planning, key metrics for Northern Ireland, are improving, with all aspects strengthening over the last five years

Communications

High Communications efficacy – however marketing spend needs Consideration (especially in what is likely to be an increasingly competitive market landscape)

Prioritising the segments



Natural
Quality
Seekers

15%



Aspiring
Families

30%



Social
Instagrammers

15%



Aspiring Families

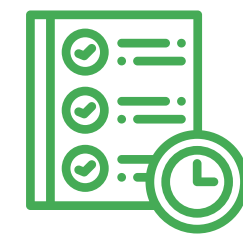
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Aspiring Families



Strong family focus



Planners – do a lot of research



Activities very important (all types, variety of interests)



Pay attention to price, seeking value



Need activities to suit children, as well as the whole family



Consider themselves bargain hunters but not afraid to pay for quality (if worth it)



Demographics

Most likely 35-44, even social class split, have younger children (under 16)



Estimated annual spend
£1,360

30%



Aspiring Families

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A group of people are sitting on a beach, looking out at the ocean during sunset. The scene is peaceful, with the sun low on the horizon, casting a warm glow over the water and the people. In the foreground, a man in a blue sweater and a black cap is seen from behind, sitting next to a woman in a brown jacket. Other people are scattered across the beach, some sitting and some standing, all enjoying the view. The sky is a mix of orange, yellow, and blue, and the water reflects these colors. The overall mood is serene and relaxing.

Natural Quality seekers

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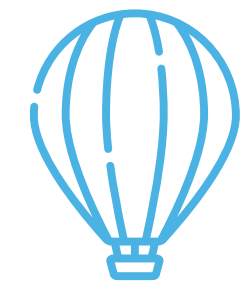
Natural Quality Seekers



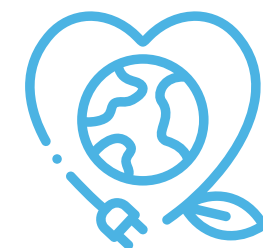
Quality of accommodation important



Nature lovers, enjoy the outdoors



Preference for gentle activities



Sustainability important



Enjoy planning and like to have clear itineraries



Short breaks important part of their lives

15%



Demographics

Older (av. age 55)
more likely to be male, ABC1,
older kids



Estimated
annual spend
£1,238

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A group of people are sitting on a beach, looking out at the ocean during sunset. The scene is peaceful, with the sun low on the horizon, casting a warm glow over the water and the people. In the foreground, a man in a blue sweater and a black cap is sitting with his back to the camera, looking out at the sea. Other people are scattered along the beach, some sitting and some standing, all enjoying the view. The sky is a mix of orange, yellow, and blue, and the water reflects these colors. The overall mood is serene and relaxing.

Natural Quality seekers

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Social Instagrammers

Social Instagrammers



Buzz and atmosphere seekers



Short breaks important part of life



Seeking nightlife, great pubs etc.



Want to broaden the mind



More likely to use AirBnB



Connectivity very important (Wifi, 4G)



Getting a good deal and engaging in activities deemed more important than finding great accommodation

15%



Demographics

Youngest segment with 29% aged 18-24yrs and 26% aged 25-34yrs. Least likely to have children. More likely to be female, slight C2DE bias.



Estimated annual spend
£1,006

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Social Instagrammers

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Developing an action plan



Time to start doing!



Detailed planning and sales resources in development



Enabling broad participation and facilitating focussed decision making and action taking

A Strategy for growth

In order to deliver the desired growth for the domestic market, the strategy focuses on four key pillars:



**Effective
Communications**

**Compelling
experiences,
attraction and events**



**Citizen and
Community
engagement and
advocacy**

**Industry and
stakeholder
engagement**



Domestic Market Action Plan template



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NI Domestic Market. Your key to recovery.

This programme is designed to support your business develop a clear road map and action plan to capitalise on the vitally important Domestic Market in these challenging times.

The ultimate goal is to develop a compelling visitor proposition, shaped to meet the specific needs of one or more of the market segments outlined in the new Domestic Market Segmentation Strategy. There will be a focus on developing propositions which are market-ready, tied into the NI Recovery Marketing Plans in the short term, price sensitive for the domestic market but commercially viable and sustainable for the business over the longer term.

It is applicable to businesses who have been traditionally focused on the domestic market and simply need to up their game in light of the new strategy, but is also relevant to those businesses who need to “pivot” from an international market focus, in the short to medium term, as a result of the pandemic.

We hope that you have had an opportunity to read the Domestic Tourism Strategy in detail and revisit the webinar itself.

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NI Domestic Market. Your key to recovery.

Domestic Market - Stage 1

Business Details

Please provide some details of your business organisation.

Business Name *

Business Address

Town / City

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Domestic Market - Action Plan Download

Thanks for attending our webinar, and completing the Stage 1 Form.

Please now review the Strategy, webinar, and action plan template.

- Research and consider NI and local context
 - Consumer Sentiment and Market Research
 - Issues and challenges facing your business
 - Market Recovery Plan
 - Business and Marketing Support available



Domestic Market Action Plan Template

Following the webinar, use this template to create your own Domestic Market Action Plan. Once completed, please follow the instructions within to submit to Tourism NI.

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Effective Communications

Objective

Deliver effective communications that resonate with, and influence, the domestic audience to holiday/take a short break in Northern Ireland.

Effective Communications

Action Plan Points to Consider

1. What segment does my current product/experience most appeal and what are their passion points/motivations?
2. What elements of my current product/experience address these passion points/motivations?
3. What is unique or interesting about the region I am in, that has the capacity to excite or interest this priority segment?
4. What communications platforms offer the best means to reach this priority segment?
5. To what degree am I currently utilising these communication platforms?
6. Identify the most effective communication channels in terms of driving sales. What should I be doing more or/less of from a communications perspective?

Compelling Experiences, Attractions and Events

Objective

Build out and improve new and existing
tourism experiences, attractions and events

Epic fun, without the epic trek.

Compelling Experiences, Attractions and Events

Action Plan Points to Consider

1. What additional product and experience elements do I need to develop in order to win my priority segment?
2. What is the duration of my product/experience - half-day /day trip), 36-hour experience or longer?
3. If it currently a half day/day trip - how can I enhance/add value to the experience and extract more revenue and could this develop in the future to include an overnight stay?
4. How can I enhance my current food and drink offering?
5. What can I offer to enhance the night-time experience?
6. How does my product/experience sit within the wider visitor destination context?
7. Is my cost and pricing structure commercially viable and does it appeal to the target market?

Citizen and Community Engagement

Objective

Build resident engagement, pride in and advocacy for Northern Ireland as a tourism destination



Epic fun,
without the
epic trek.

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Citizen and Community Engagement

Action Plan Points to Consider

1. To what degree is my business connected to my local community?
2. Does the local community appreciate the value of tourism to our region?
3. How can I leverage/improve my community connections to contribute to tourism experience?
4. Can I develop a more sustained local recruitment and training programme?
5. Would a local volunteer programme work, an intern programme with local college/university
6. Talks to local community groups/colleges/residents associations , fam trips etc

Industry Collaboration, Activity and Development

Objective

Collaborate and build connections at all levels to ensure the progress and development of the domestic tourism offering



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Industry Collaboration, Activity and Development

Action Plan Points to Consider

1. What local businesses could you collaborate with to enhance the overall product/experience and consider the exact nature of their involvement?
2. Which local partners i.e. local Council /other local initiatives/ funders could you work with and identify the support or benefit they would bring to your business?
3. Which indirect booking options, Online travel Agency's (OTA's) could you work with to drive b2b bookings/sales?
4. How could Tourism NI further support the development and marketing of your product/experience?
5. Who else do I need to work with to fully develop my product/experience

Action Plan

Having Considered all the actions above.....

How market ready is your product/experience?

1. Concept Stage

The vision, ambition, target market and basic concept are in place but requires significant intervention and support to become a viable proposition

2. Under development

With some further work and additional support this could become a viable proposition

3. Market Ready

My product/experience is commercially viable and underpinned by a robust cost and pricing structure, proven sales channels and positive customer feedback

Action Plan

Business Support and Training Needs

What further support does your business/cluster of businesses require?

- Business Models and Strategy
- Routes to Market
- Partnership and Collaborative Working
- Market Research and Consumer Trends
- Pricing, Costing, Margins
- Digital Inc website, social media & booking platforms
- Selling Skills and Meet the Buyer training
- Developing Content, Imagery and Storytelling
- Other

Next Steps

1. Following this webinar, You will receive a follow up email with instructions on how to download the Action plan template
2. Review the Strategy document and both webinars
3. Research and consider NI and local context
 - NI Guidelines,
 - consumer sentiment and Market Research
 - Issues and challenges facing your business (Risk Assessment)
 - Market Recovery Plan
 - Business and Marketing Support available (local and NI)
4. Complete Action Plan template and Business Support Needs analysis
5. Upload to the dedicated web page



Some
Questions
you may have...



What should I do if I have
further clarifications or
questions?

What about the other closer to
home markets?
i.e. ROI and GB markets

I have submitted my Digital
Action Plan – What happens
next?



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Thank
you

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