



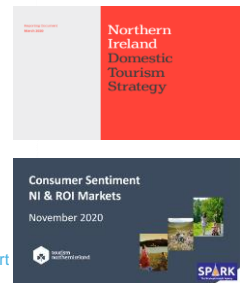
What we will cover....

- Review of Assets and Support
- Review of Key Domestic Market Segments
- Your Domestic Marketing Plan 2021- Key to Recovery





Assets and Support


- Domestic Strategy/Webinars
- Market Segment Videos
- Action Plan Template
- Consumer Sentiment Surveys
- Market Insights
- Industry e-zine
- Experience Development Programme
- Local Council Business/Marketing Support





The Trends – At a Glance:

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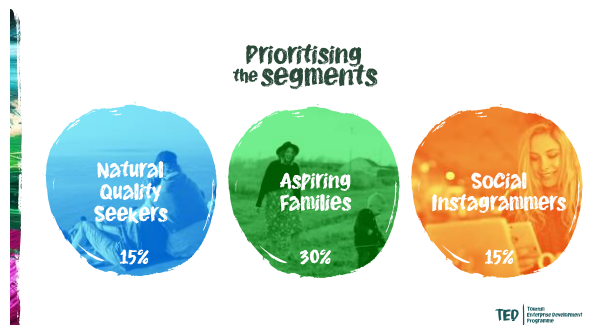
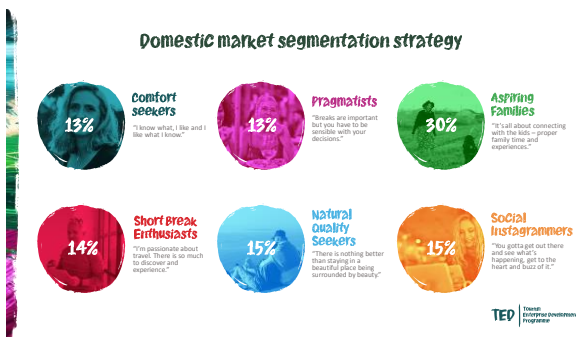
Health and wellbeing: The development of vaccines has raised hopes of revitalised traveller confidence in 2021, but health and wellbeing will top the agenda for years to come.
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Conscious travel: The Covid-19 crisis has boosted consumer awareness of sustainability, and galvanised conversations about building back better. What could this mean for travel and tourism?
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Digital transformation: Virtual travel experiences, touchless tech solutions, and digital customer service may sustain prospective travellers' interest during lockdown and help restore their confidence.
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The resilient traveller: The fundamental desire to travel remains unchanged, but cautious consumers will seek reassurance and flexibility from travel providers.
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The next normal for travel and tourism: The second spike in coronavirus cases has subdued momentum going into 2021, but the short-term outlook suggests recovering confidence as well as ongoing uncertainty.





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 6)

Estimated annual spend
£1,360

30%

The infographic features a green background with a circular graphic containing '30%'. It includes icons for a family, a magnifying glass, a shopping bag, and a person with a child. The TED logo and 'Tourism Economic Development Programme' are in the bottom right corner.



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**

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

Estimated annual spend
£1,238

15%

The infographic features a blue background with a circular graphic containing '15%'. It includes icons for a house, a hot air balloon, a person with a backpack, a mountain, a recycling symbol, and a person with a backpack. The TED logo and 'Tourism Economic Development Programme' are in the bottom right corner.



Social Instagrammers

- Buzz and atmosphere seekers
- Seeking nightlife, great pubs etc.
- More likely to use Airbnb
- Getting a good deal and engaging in activities deemed more important than finding great accommodation
- Short breaks important part of life
- Want to broaden the mind
- Connectivity very important (WiFi, 4G)

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 CO2E bias.

Estimated annual spend
£1,006

TED | Digital marketing investment programme



A Strategy for growth

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

- Effective Communications**
- Citizen and Community engagement and advocacy**
- Compelling experiences, attraction and events**
- Industry and stakeholder engagement**

TED | Digital marketing investment programme



Effective Communications

Objective

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



Compelling Experiences, Attractions and Events

Objective

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

Epic fun, without the epic trek.



Citizen and Community Engagement

Objective

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



Industry Collaboration, Activity and Development

Objective

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



Recovery Marketing Plan

To Inspire People to staycation at home and Embrace Northern Ireland's Giant Spirit

- Tourism NI Campaign
- Council local campaigns
- Consumer research will inform Marketing tactics
- Epic Fun without the epic track
- Warmth of Welcome, get away from it all, world class food and drink, beauty of landscapes, immersive experiences
- Safety focus "Good to Go" industry standard
- Create the best prospects for immediate bookings

