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Today's Webinar



What we'll be covering today

- Importance of the ROI market – key facts and figures
- Key factors that will shape the future
- The future scale of ambition
- Refreshed segmentation strategy and prioritisation
- Strategy for growth – an overview
- How we will measure success
- From strategy to action...where to from here...
- Questions

The image is a collage of four distinct scenes. The largest scene, occupying the left and center, shows a red canoe with three people in orange life jackets on a calm lake at sunset. The water reflects the golden light of the sun. In the top right corner, a hand in a blue plaid shirt reaches out towards a red object against a blue sky with white clouds. The bottom right corner shows a wooden pier extending into the water. In the bottom right corner, a building with a red sign is visible. The text 'The Importance of the ROI Market' is overlaid in a white, hand-drawn font across the center of the lake scene.

The Importance of the ROI Market

Key facts and figures

66%

Volume increase 2016-2019
(from 454k to 755k
overnight trips)

25%

Share of external
visitors (excluding NI
residents) in 2019 (up
from 17.5% in 2016)

103%

Growth in revenue from 2016
to 2019
(£142M spend in 2019)

19%

Of spend of all external
visitors in 2019 (up from
11% in 2016)





Key factors that
will shape the future



Macro-economic factors

- Consumer confidence on the increase
- Increased household savings
- Strong economic recovery predicted in 2022
- 6 percent growth versus 2019 forecast* by 2022 (sole external market to delivery growth)
- 5 percent population growth to 2025 (focussed on Greater Dublin Area)
- STG predicted to lose 5% to the Euro in the medium term (enhancing competitiveness)
- However, impacts of Brexit not fully known

Brand factors

- Northern Ireland brand has been building momentum and increasing traction within the ROI market
- 2017 to 2019 saw a 36% increase in campaign spend (by TNI) coupled with a trend of improving impact of communications
- Embrace a Giant Spirit experience brand is also gaining traction within ROI, driving overall interest in Northern Ireland
- However, key issue remains knowledge of Northern Ireland as a short break/holiday destination
- Furthermore, sporadic negative news stories continue to undermine the overall destination brand



Competitive factors

- NI brand performs as strongly as ROI on key factors that influence the choice of a short break/holiday
- 57% of ROI consumers who have taken a break in Northern Ireland indicated it met their expectations, with a further 40% stating it exceeded their expectations
- However, a key basis for competitive advantage, the perception of value for money, has weakened since the 2016 strategy was put in place
- Island of Ireland market share of overnight trips from 4.6% to 6.1% and share of expenditure from 4.5% to 7.1% (2016-2019)



Consumer factors

- 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
- *However, three broad cohorts of consumer need to be addressed*
 1. Those who have little knowledge and limited experience of Northern Ireland – drive knowledge and relevance
 2. Those who are building knowledge – drive consideration and conversion
 3. Those with knowledge and experience of Northern Ireland – drive repeat visitation and advocacy





The future scale of ambition

Scale of ambition

10%

Value share of ROI trips on the Island of Ireland (up from 7.1% in 2019)

£193M

In revenue (up from £142M in 2019)





segmentation strategy

Updated Segmentation

Active
Maximisers



33%

Good Time
Families



8%

Open Minded
Explorer



15%

Indulgent
Relaxers



11%

Open Minded
Families



13%

Culture &
Connections
Seekers



20%

Segmentation evolution



Active Maximisers growth:

There is **dramatic shift** in the number of Active Maximisers (**from 10% to 33%**), with a greater prevalence of **young families** within this segment.



Culture & Connection Seeker growth:

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.



Getting Outdoors:

All segments now demonstrate a **greater interest** in the **outdoors** and **engaging in activities**



Travel comfort:

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**.



Family:

There is a stronger presence of **'family'** as a defining characteristic within the **segmentation strategy**.

Priority Segments



Volume



Value



Conversion efficiency



Travel comfort

Segment

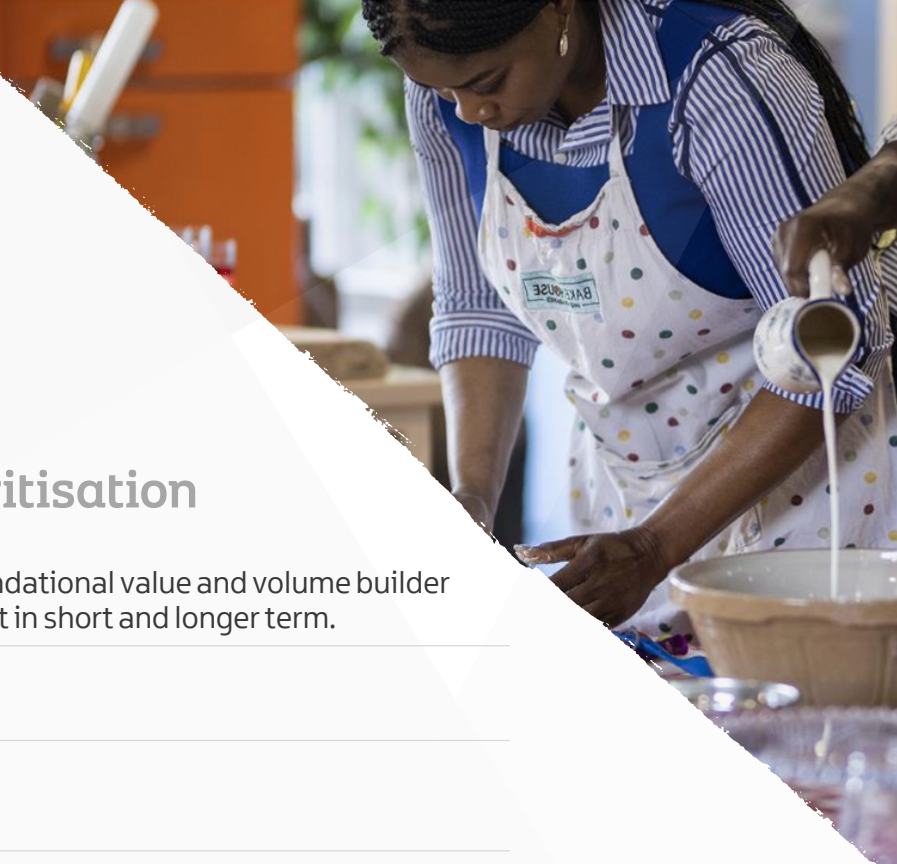
- 1 Active Maximisers (33%)**
- 2 Culture and Connection Seekers (20%)**
- 3 Good Time Families (8%)**
- 4 Indulgent Relaxers (11%)**
- 5 Open Minded Explorers (15%)**
- 6 Open Minded Families (13%)**

Prioritisation

Key foundational value and volume builder segment in short and longer term.

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.

A high value segment of interest that steadily grows in importance for efficient value and volume over time.



Winning Key Segments

Active Maximisers

- Demonstrate NI's capacity to deliver a range of action packed, diverse and unique experiences.
- Nuance offering for this segment for those who are pre-family and also those with young families.

Indulgent Relaxers

- Harness the latent demand for indulgent / high quality pampering breaks and experiences.
- Amplify the quality of NI's food, shopping and night-time offering.

Open Minded Explorers

- Focus on segments desire for learning and new experiences by promoting the best of Northern Ireland's outdoor (natural beauty), cultural and food offering.
- Emphasize the NI 'welcome' and opportunity to engage with local people and culture.





Understanding priority segments



Active
Maximiser

Active Maximisers

33%



Like to have **planned** and **packed** itinerary.



Significant number (57%) will **have young children**.



Seeking **night life, buzz** but also **romantic destinations**.



Looking for **energetic experiences, unpredictability**.



Looking for a **great destination** and will **plan around that**.



Active on **social media** and like to **share holiday online**.





Indulgent Relaxers

Indulgent Relaxers

11%



Motivated by the opportunity to spend time with family or friends on short breaks.



Interested in shopping opportunities while on a short break.



Like to 'indulge' themselves when on a break.



Prefer to stay in large comfortable hotels.



Most likely segment to take a 'romantic' break as their next break.



Enjoy good food and music.





Open-Minded EXPLORERS

Open Minded Explorers

15%



Food is very important and highly motivating for them.



Concern about the personal safety and health.



Motivated by culture and are seeking unique experiences.



Want high quality accommodation.



Interested in the natural environment, scenic attractions.



Want good value for money.



A Strategy for Growth



A Strategy for **Growth**

Key platforms



Collective Effort

Industry
Engagement
and Development



Compelling Communications

Powerful
messaging



Constant Purchasability

Maximizing
conversion



collective Effort

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



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



Develop and enhance consumer segment understanding



Prioritise '**hospitality**' as a key industry development focus



Understand the competition – achieving parity, superiority and differentiation

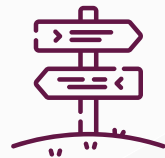


Compelling Communications

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



Continued development of the Embrace a Giant Spirit **experience brand**



Highlight major and unique attractions/offerings



Focused **tactical communications**



Joined up **communications and messaging**



Appropriate **investment**



Constant Purchasability

Creating the **conditions** through which **compelling** and **connected** **short break propositions**

(accommodation and attractions) are easily **accessed** and **purchasable**.



Multi-dimensional segment led **holiday propositions**.



Optimisation of **key sales platforms**.



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



Strategic Foundations

What will support execution of the strategy?



Segment
Centric
Ethos



Effective
Strategy
Management



Actionable
Market
Intelligence



Ongoing
development
of sustainability
credentials





How will we
Measure
success?



Measuring Success

Hard commercial metrics

- Win 10% value share of ROI trips on the Island of Ireland

Brand, marketing and customer funnel metrics

- 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%

Industry focus and collaboration

- Industry developing product and experiences that are connected to, and fit with 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.