



Comhairle Ceantair  
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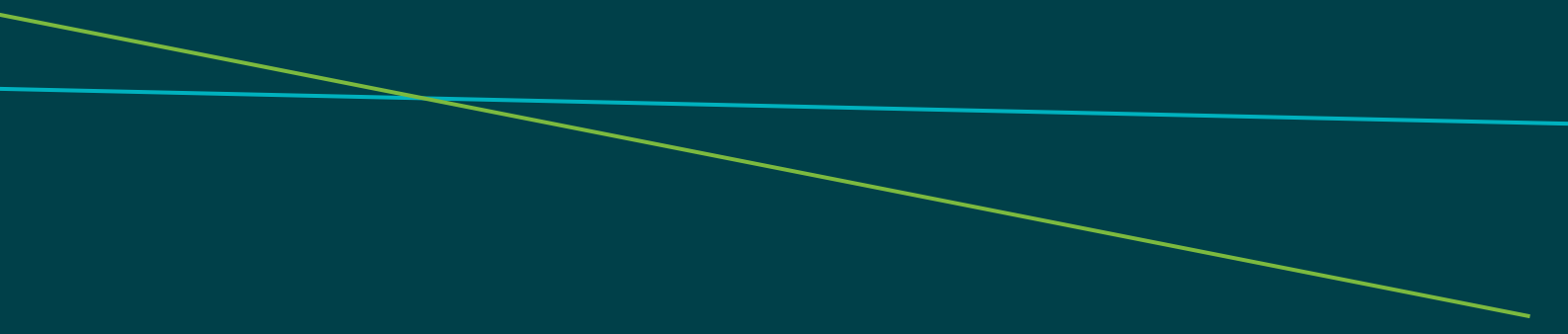
**Newry, Mourne  
and Down**  
District Council

# **NEWRY, MOURNE & DOWN DISTRICT COUNCIL**

## **TOURISM MARKETING PLAN 2018-19**



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01

# EXECUTIVE SUMMARY

The outlook for tourism in Northern Ireland is generally good, particularly in relation to the Republic of Ireland market which has demonstrated a significant upturn in performance. 2016 evidenced a return to growth (+19%) in holidaymakers from the ROI market.

However significant opportunity still exists – ROI residents took over 5million overnight holiday trips on the island of Ireland in 2016, spending £942m. NI's share was just 3% of holiday trips and only 4% of holiday spend. From an ROI perspective, further growth in domestic holiday taking is expected, as a region, Newry, Mourne and Down must position itself to take advantage of latent potential. The GB and overseas market also offers opportunities for growth. Provision of excellent tourism experiences is key to success. The Tourism Strategy adopted for Newry, Mourne and Down in March 2017 is visionary, and in order to achieve our vision of becoming a premier tourism destination on the Island of Ireland it is important to ensure the tourism industry is supported in order to develop their capacity and offering to meet the demand from existing and new inbound visitors to the region. As part of the delivery of the Tourism Strategy, the Council has been developing a Visitor Experience Plan in close partnership with tourism businesses from across the region. Through this work Council officers have engaged with over 40 tourism and hospitality businesses through 6 cluster groups across the district to work closely with them

to carefully develop and bring these experiences to life. A database has been built of key themes, stories and tourism experiences that are unique to this region and that can be promoted to prospective international visitors in order to grow incoming tourism revenue and volume to the district. Building on the vision set out in our Tourism Strategy, and subsequent work undertaken with tourism businesses in the development of the Visitor Experience Plan we are now in a position to promote the region to new prospective visitors and to start to strengthen our position as a premier tourism destination. This Marketing Plan sets out how we can continue to work towards our vision and start to strengthen our position as a premier tourism destination through a marketing campaign that focuses on how people will feel when they visit this region. This campaign will be called Heaven in a Heartbeat.





It is proposed that the Council tourism team will work closely with tourism business through the clusters to create a series of mini digital campaigns within the Heaven in a Heartbeat campaign that are targeted at specific audiences in ROI, GB and Europe. The campaign will drive potential visitors to a destination website – i.e. the ‘dreaming’ and ‘planning’ stages of visitors’ holiday journey. The success of the Footsteps in the Forest campaign in 2017 demonstrates the effectiveness of this approach, where 58% of visitors to the event came from the ROI market.

As well as our core tourism offerings such as the Game of Thrones and the Mournes, this plan will also accommodate key council-led events and festivals. These will be grouped together under key themes and cross-marketed to target audiences. The campaign will be based mainly on the delivery of content through social media channels, using market and audience insights to target the people most likely to be warm to the variety of experiences on offer. Video will be a key tool in this process, using new edits of existing footage to drive attention, interest and visits to Newry, Mourne and Down. We will also aspire to always be present in the moment where potential visitors are looking for travel inspiration online. This ‘moment marketing’ approach is underpinned by a search/PPC activity, adding context to our message, but also proposing an answer to the consumer’s travel need.







# 02 GOALS

# 02.1

## WHAT WILL BE ACHIEVED THROUGH THIS MARKETING PLAN

This Marketing Plan sets out to achieve the following goals:

### 01

Significantly grow visitor volume and revenue to attractions, events, and into the hospitality and tourism businesses in NMD – specifically from the Republic of Ireland market (NMD accounted for 9% of all overnight trips in N.I. and total visitor spend in the region of £47.7 million, representing 6% of all visitor spend in N.I. in 2015).


### 02

Develop opportunities for partnership marketing with local hospitality and tourism businesses to ensure NMD can reach key target markets with consistent messages in a targeted way.

### 03

Support the development and delivery of TNI's marketing campaigns to grow visitor's numbers to NI and NMD.





Achieving these objectives through the delivery of this marketing plan will ensure the following subsequent objectives can be delivered:

**04**

Establish more opportunities to work with Tourism Ireland to reach a number of key international markets that have a high potential for taking short in NMD.

**05**

Support the sustained growth of hospitality and tourism businesses in NMD.

**06**

Raise consumer awareness of the NMD district and the high-quality tourism offering throughout NI and ROI.







# 03 CONTEXT

## 03.1 GENERAL PICTURE

The ROI market represents the greatest opportunity for the region from a tourism perspective, however to build on this potential it's important to understand the numerous economic, competitive, consumer and brand factors at play:

### MACRO-ECONOMIC FACTORS

Currency fluctuations: Recent currency movements have resulted in the strengthening of the Euro versus STG and this in turn has delivered an improved performance, making the region more financially appealing for the short breaks market.

### COMPETITIVE FACTORS

In order to perform against a very strong tourism offering in ROI, the Newry, Mourne and Down region has the opportunity to be positioned as an attractive proposition to ROI consumers looking for short breaks. Some of the key drivers of decision-making in this regard are the ability to present a wide range of quality places to eat and stay, and the opportunity for tourists to capture unique and authentic visitor experiences.

### CONSUMER FACTORS

In order to attract more visitors it is evident that the NMD region must be seen as compelling and motivating to be considered as a destination for ROI consumers. Without a coordinated and targeted marketing plan this could be a major constraint to growing our tourism volume and revenue as research has indicated that the actual level of consumers from the South who plan to visit the North in the next three years is lower than the number of consumers who plan to take breaks within ROI (58 percent Vs 83 percent respectively).

We must also improve knowledge about NI amongst ROI consumers. As 54% state they don't know NI 'that well' or 'not well at all', there is a real opportunity to influence behaviour by raising the level of awareness about what to do, where to stay, where to eat and even basic geography and ease of access.

### BRAND FACTORS

Northern Ireland is viewed quite positively by ROI consumers, but this attitude must be built on by establishing 'must see' and 'must do' tourism propositions. Our short break holiday experiences must be presented as compelling enough relative to the ROI domestic offering in order to drive choice.

Historically the North has suffered from a 'poor value for money' perception and has been considered an expensive destination (although current exchange rate conditions counteract this and the perceived value for money offering is now a competitive advantage);



## MIXED PICTURE FOR TRAVEL INTENTIONS

Uncertainty caused by Brexit is forecast to see the UK's GDP growth slow in 2018 with household incomes squeezed by higher inflation. This slowdown in consumer confidence is likely to persuade more UK consumers to holiday close to home in 2018.

The most recent tourism performance statistics for Northern Ireland point to a reduction in overnights from the domestic market (down by 12%), however the GB & Overseas market (up by 11%) presents an opportunity for growth.

Forecast growth for the economy in the ROI is slightly more positive with GDP growing more slowly than in recent years, but still at healthy levels. The exchange rate is predicted to remain favourable for ROI tourists in 2018, an economic trend which has led to ROI visitor trips to NI increasing by 27% in Jan-Sep 2016. Attracting more visitors from the ROI market to NMD is therefore likely to remain an attractive proposition for tourism businesses in this region; however the continued expansion of outbound routes from Dublin Airport creates more competition in this market than ever.

## TRAVEL EXPERIENCES ARE IN HIGH DEMAND

Consumers are increasingly living in an experience economy. 57% of NI consumers agree that how they spend their time is more important than the money they make (source: TGI). For the travel market, this means that consumers will continue to search for authenticity in holiday experiences – in terms of culture, people, the built and natural environment. Global rental giant, Airbnb, has signaled its intention to capitalise on this trend by rolling out tours and learning experiences run by 'micro entrepreneurs' in 12 cities worldwide.

Mintel research (2016) found that Irish consumers prefer to arrange their own holiday trips and this likely reflects their desire for bespoke and personalised experiences. The ease with which they can do this through the internet and technology, such as smartphones and apps, and the ability to compare and obtain low prices is driving this and will see Irish consumers increasingly opting to book their own short breaks and holidays.

Eating and drinking in local pubs and restaurants; shopping; and getting out into the countryside are some of the top activities that Irish consumers do when they are on a short break or holiday. The emphasis of local food and drink reflects Irish consumers' desire for an authentic experience when taking a short break and holiday.

Exploring towns and cities, either through walking or cycling, is a popular activity among Irish consumers when taking a short break or holiday. This indicates that discovery of new and unique locations is important to Irish consumers and provides opportunities for walking tours and cycling trails to enable consumers to explore towns and cities that are off the beaten track.

Authenticity and discovery are important to Irish consumers when taking a short break or holiday. As such, promoting the various cuisines that are unique to the different regions, through initiatives such as the NI Year of Food and Drink, and providing opportunities to venture off the beaten track to explore and experience the lesser-seen regions will further boost the appeal of the region to both domestic and overseas consumers.

## CONSUMER TRUTH

The outlook for tourism here is very positive, particularly in relation to the ROI and GB markets, which may be more inclined than usual to holiday closer to home. NMD is well positioned to take advantage of this potential increase in tourism through its authentic tourism assets.



## 03.2

# HOW PEOPLE PLAN AND BOOK

Digital platforms have changed the way consumers plan, book and experience their holiday experiences.

Digital platforms play a crucial part in the decision-making process of every facet of the holiday experience – choosing a destination, reviewing accommodation, booking travel itineraries etc. To be successful in the promotion of the region, we must be aware of the journey the consumer takes and look to influence this process, delivering our message at the right time, to the right consumer, in the right place. As a guiding framework, we have used Google's universally accepted five stages of travel model – Dreaming, Planning, Booking, Experiencing and Sharing - to map out a framework for marketing communications.

This model has been developed with a global context in mind and provides a strong universal framework for guiding marketing communications, however should be applied flexibly when planning for the ROI market in particular.

The ROI consumer's decision to take a short break on the island of Ireland occurs over a much shorter timeframe than a decision to go on a longer-haul trip. Once the demand to take a short break close to home has been triggered, many ROI consumers will move much more quickly through the Planning stage and onto Booking. For some value-conscious consumers who are driven by hotel deals, the Booking stage can often be the first stage of the process meaning that the hotel is the primary influencing factor and the destination is of secondary consideration.



## DREAMING

## PLANNING

## BOOKING

## EXPERIENCING

## SHARING

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These are the moments when people start thinking about their next holiday or short break. They will start exploring destination options according to the type of trip they want to take.

This is when the consumer narrows down exactly where to go and when. Search is universally used as the start point to explore a handful of destinations to answer questions like what can you do there, is there appealing accommodation, what's the weather like.

Once a consumer has decided on their destination they will then place a greater focus on Accommodation and transport arrangements.

When in the destination the consumer will use information searches to find their way around the destination and look for things to do, places to eat etc.

Both during and after the break the consumer will share travel experiences with their social media audience.

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At this point, the customer is in the very early stages of the decision-making process. Destination marketing can trigger demand and entice potential bookers to simply entertain the idea of booking a trip. In this early context, success constitutes inspiring customers into those first research missions – investigating a destination beyond the speculation phase.

This stage is all about providing more information to further convince browsers that what you're offering is for them.

Booking travel is a big outlay for many customers, so it's not a decision that's often taken lightly and they will shop around for deals. A strong web presence can help reassure the consumer that they are making the right decision through strong user experience – must be functional, intuitive and easy to use across all devices, frictionless payment process.

Visitor servicing. Information must be easy to find.

Provide a platform and mechanic for sharing (i.e. strong presence on social media with good use of hashtags).





# 04 STRATEGIC POSITIONING





## 4.1

# EPIC EXPERIENCES – MOUNTAINS MYTHS & MARITIME

Within the overall aspiration to become the Outdoor Capital of Ireland the existing tourism strategy includes a promise – to deliver EPIC moments, and a headline - Mountains, Myths and Maritime.

Our headline, mountains, myths and maritime, helps to develop a shared story that will begin to create a stronger image of what makes NMD distinctive - both in the minds of industry and ultimately within the marketplace. It sets the stage for the Strategy's focus on creating destination experiences that are associated with the mountains and the coastline, and for its emphasis on the stories that give the destination experiences a unique quality. This Marketing Plan will enable this 'shared story' to emerge as a powerful consumer message captured in the campaign headline Heaven in a Heartbeat. This message will appeal directly to the emotions of the potential visitors at the planning stage of their holiday.

Heaven in a Heartbeat reflects the region's aspiration to create EPIC moments. The messaging will describe an iconic and immersive experience and facilitate communication that is personalised and creative. Visitors have high expectations. The experience they are seeking is a sense of pure elation whether it is the adrenalin rush of intense outdoor activity, the hushed awe of true scenic beauty or the never-to-be-forgotten moments of new experiences, great food, good company in authentic, personal, and largely undiscovered tourism locations.

## 4.2 DIVERSITY OF CURRENT OFFERING

Within the overall aspiration to become the Outdoor Capital of Ireland the existing tourism strategy includes a promise – to deliver EPIC moments, and a headline - Mountains, Myths and Maritime.

The Newry, Mourne and Down Tourism Strategy provides an excellent analysis of the strengths and weaknesses of the locations within the region as tourist destinations. Research undertaken in late 2017 and early 2018 has provided an in-depth understanding of the immediate potential of each of the key areas within the Newry, Mourne and Down District Council. Building on the vision set out in our Tourism Strategy, and subsequent work undertaken with tourism businesses in the development of the Visitor Experience Plan we are now in a position to promote the region to new prospective visitors and to start to strengthen our position as a premier tourism destination.



## 4.3

# EXISTING AUDIENCE SEGMENTATION APPROACH

## TIER 1: PRIORITY SEGMENT-ROI

The base of any successful marketing strategy is in knowing your target audience.

Understanding travellers' requirements and aspirations helps destinations such as NMD speak more effectively to and not at their ideal visitor – better catering to their needs, habits and expectations. After much research completed by Tourism NI, Tourism Ireland and the Department for the Economy, the Republic of Ireland has been identified as the priority segment for Northern Ireland tourism.

### Identifying ROI as a Priority Segment

The ROI market represents a significant tourism opportunity for Newry, Mourne and Down. In 2016, NI attracted more overnight visitors from ROI (456,000) than from mainland Europe (385,000) or North America (250,000). Furthermore, the economic outlook now and into the future for the ROI market is positive and ROI residents have been holidaying more at home, with ROI domestic holiday trips increasing by one fifth between 2012-2016

In the recent past (2012-2015), due to a number of factors, holiday makers trips to Northern Ireland from ROI declined by 29 percent. In response to this decline, Tourism NI established an independent Taskforce composed of industry leaders and influencers who operated in both the NI and ROI markets. The role and purpose of the Taskforce was to facilitate the development of a strategy designed to drive the recovery of, and growth from, the ROI market. Set against this background the Taskforce engaged in a complete review of the market. The core focus of this review was to determine the key reasons for the decline and identify the strategic imperatives required to stabilise performance and drive sustainable growth in the future.





During the course of the review, however, the ROI market demonstrated a significant upturn in performance. Full year figures for 2016 demonstrate a return to growth in terms of holidaymaker trips (19% increase since 2015), while value grew by 6%. The recent positive performance continued into the first half of 2017, with NI welcoming one third more ROI holiday visitors compared with Jan-June 2016. In total, ROI trips to NI grew by almost one quarter and spend increased significantly during the first six months of 2017.

The recent positive performance continued into the first half of 2017, with NI welcoming one third more ROI holiday visitors compared with Jan-June 2016. In total, ROI trips to NI grew by almost one quarter and spend increased significantly during the first six months of 2017.

It is worth considering the ROI residents took 5m overnight holiday trips on the Island of Ireland in 2016, spending £942m, NI's share was just 3% of holiday trips and 4% of holiday spend. From an ROI perspective, further growth in domestic holiday taking is anticipated, with short breaks dominating. Looking towards the future, and as the NI tourism proposition develops and matures, the ROI market undeniably represents an opportunity for accelerated and sustainable growth.

## NI's main competitor is ROI

NI is consistently outperformed by ROI on most of the key motivating short break activities (e.g. shopping, nightlife, enjoying the natural environment, engaging with locals etc.).

Importantly, ROI consumers rate ROI as offering better places to eat and stay – two key drivers of decision-making in choice of a short break destination. In essence, we face a more mature and strong key competitor in ROI. This presents a significant challenge – namely how to make NMD more relevant to ROI consumers in order to drive preference for a short break over their domestic offering.

While only a minority of ROI consumers reject NI (9%), the actual level of intent to visit NI (in the next three years is low relative to the level of consumers that plan to holiday at home (58% vs 83% respectively).

Knowledge about NI is low amongst ROI consumers, with 54% stating they know NI 'not well at all' or 'not that well'. ROI consumers are challenged not only by a lack of awareness of what they can see and do during a break in NI but also by a limited awareness of places to stay, eat and basic geography.

Based on the challenges and opportunities that the taskforce identified for ROI visitors to NI, they developed a new holidaymaker segmentation model:

## INDULGENT RELAXERS (13%)

- Short breaks are viewed as an important part of their lives;
- Likely to relax, indulge themselves on their short breaks;
- Seeking comfort, ease and value for money;
- Prefer large, quality, comfortable hotels and enjoy natural scenic surroundings;
- Seek calm certainty rather than activity, interaction and unpredictability.

## OPEN TO IDEAS (18%)

- Conduct a lot of research online, consider reviews and influenced by media;
- Open-minded and interested in the outdoors, sport, music and history;
- Seeking organised 'active' but not adventurous activities; motivated by nature/outdoors;
- Like to plan and have an itinerary;
- Value for money important and influenced by deals;
- Like 'easy to get to' destinations and scenic natural surroundings.

## ACTIVE MAXIMISERS (10%)

- Like to squeeze in as much as possible on a short break;
- Enjoy energetic activities (but not extreme sports) and have a strong sense of adventure;
- Passion for outdoors and the natural environment;
- Looking for unique and mind broadening experiences;
- Digital a very significant influence;
- Focused on getting a good deal'
- Actively research online;
- Need to be connected (Wi-Fi etc.)

## FAMILIES SEEKING A BUZZ (18%)

- Looking to spend quality time with kids, enjoying activities that suit all the family.
- Want high quality accommodation;
- Also motivated by city buzz and atmosphere - shopping, pubs, nightlife;
- Wi-Fi and mobile coverage important;
- Strong usage of digital - planning and booking.

## CONNECTION SEEKERS (4%)

- Motivated by experiencing local culture and interacting with locals and other holidaymakers;
- Highly interested in place - natural environment, historic sites;
- Seeking unique experiences;
- Quality accommodation and food important;
- Digital of little or no influence.

## BUDGET EXPLORERS (13%)

- Highly focused on value for money and getting the best deal;
- Price matters, actively watch currency fluctuations;
- Very interested in all aspects of place – natural environment, welcoming locals and local culture;
- Value unique experiences – art, architecture, historic sites;
- Looking for quality, dedicated time with their children and a good welcome from locals.

## OPEN-MINDED EXPLORERS (17%)

- Wish to engage with local people and local culture;
- Seeking unique experiences and interested in learning;
- Want high quality hotels and food;
- Appreciate and enjoy the natural environment and scenic beauty;
- Enjoy planning breaks, doing a lot of research and rely on traditional media and tourism websites more than other segments.

## UBER ENTHUSIASTS (7%)

- Highly engaged;
- Value for money very important;
- Seeking easy to organise breaks, places that are easy to get to, great food, quality accommodation;
- Natural environment, history and culture all deemed important;
- Very open to influence – online and traditional media.



These eight segments make up what the taskforce regard as all ROI visitors to NI. However, when we consider scale (the actual size of the segment), value (the estimated level of spend on short breaks by each segment) and propensity (the likelihood of visiting NI in the future), the taskforce regards the three priority segments as:

## 1. OPEN TO IDEAS

## 2. OPEN-MINDED EXPLORERS

## 3. ACTIVE MAXIMISERS

While the priority segments have been defined by the key motivations that differentiate them from each other it is critically important to understand that all segments have fundamental needs that our region must meet in order to be considered as a short break destination of choice.

These 'tablestakes' relate to the desire to stay in comfortable accommodation (with good facilities), have easy access to quality food and drink, underpinned by excellent service, authentic hospitality and good value for money.

Of these priority segments, two ('Open to Ideas' and 'Openminded Explorers') are characterised by a willingness and disposition towards trying new things, going new places and being open to new experiences. Both are segments of scale and have a greater likelihood to consider NI and NMD than other segments.

What distinguishes these segments is the types of experiences they are seeking – with the 'Open to Ideas' segment having a greater focus on activity, the outdoors and nature and the 'Openminded Explorers' having a greater interest in people, place and culture. It could be hypothesised that the 'explorers' are a more mature version of the 'open to ideas' segment.

The third segment, Active Maximisers, is smaller in size but is currently more likely to visit NI than the majority of other segments. This is a younger segment, more focused on getting the most out of their short breaks and seeking unique and mind-broadening experiences. As such, this segment represents not only holidaymakers of today but holidaymakers of the future.

## OPEN TO IDEAS PROFILE

### Keyword

Organised activities, reviews, itinerary, history, sport, music, outdoors, scenic, active, deals, open minded, nature, online research.

### Focus

Great focus on activity, the outdoors and nature with a willingness and disposition towards trying new things, going new places and being open to new experiences.

### Who are they?

- 30-45 young family or independent couple. Medium-high disposable income
- Conduct a lot of research online, consider reviews and influenced by media
- Open-minded and interested in the outdoors, sport, music and history
- Seeking organised 'active' but not adventurous activities; motivated by nature/outdoors
- Like to plan and have an itinerary
- Value for money important and influenced by deals
- Like 'easy to get to' destinations and scenic natural surroundings.

### Typical Media Consumption

Facebook, news, Snapchat, Trip advisor, Pinterest, travel blogs, google, digital content sites (Netflix), some traditional print.

## OPEN-MINDED EXPLORERS PROFILE

### Keyword

Traditional media, high quality hotels, Local people, high quality food, tourism websites, local culture, learning, scenic, open minded, unique experiences, plan, online research, nature

### Focus

Great interest in people, place and culture with a willingness and disposition towards trying new things, going new places and being open to new experiences

### Who are they?

- 50+ empty nesters with medium-high disposable income, typically retired.
- Wish to engage with local people and local culture
- Seeking unique experiences and interested in learning
- Want high quality hotels and food
- Appreciate and enjoy the natural environment and scenic beauty
- Enjoy planning breaks, doing a lot of research and rely on traditional media and tourism websites more than other segments.

### Typical Media Consumption

Traditional media (print and TV/Radio), Facebook, TripAdvisor, travel journals, news and current affairs.

## ACTIVE MAXIMISERS PROFILE

### Keyword

Adventure, digital influences, always connected, mind blowing, squeeze more in, active, outdoors, unique experiences, nature, online research.

### Focus

Great focus on getting the most out of their short breaks and seeking unique and mind-broadening experiences.

### Who are they?

- In their 20s, they are the holiday makers of the future, low disposable income and always searching for the next Instagram photo opportunity
- Like to squeeze in as much as possible on a short break;
- Enjoy energetic activities (but not extreme sports) and have a strong sense of adventure
- Passion for outdoors and the natural environment
- Looking for unique and mind broadening experiences
- Digital a very significant influence
- Focused on getting a good deal
- Actively research online
- Need to be connected (Wi-Fi etc)

### Typical Media Consumption

Instagram, Twitter, Airbnb, Facebook Snapchat, Youtube, Groupon (deal websites), online forums and reviews TripAdvisor, TimeOut blog, digital TV.



# 4.4 TIER 2: NORTHERN IRELAND & GREAT BRITAIN

In the development of this Marketing Plan we have developed a custom segmentation approach to complement existing Tourism NI and Tourism Ireland models, but also taking into account NMD's strengths matched with visitors' motivation.

## A Wider Destination Sell

Tier 1 segments represent those with the high potential for growth in overnight stays. Below are broad audience segments whose motivations align with what the broader NMD destination has to offer.

### Segments include:

## 1. GREAT ESCAPERS (GB & OVERSEAS)

## 2. FAMILY FUN (NI)

## 3. TIME TOGETHER (NI)

## GREAT ESCAPERS PROFILE

### Keyword

Slow travel, relaxation, rebalancing, getting away from it all, connecting with loved ones, Breath-taking landscapes, ancient sites, remote places, landmarks, fresh and local food, authentic pubs, ease, romantic

### Focus

Great focus on getting away from it all, renewing family bonds and spending time together in a beautiful place.

### Who are they?

- They are often couples, in their 30s– sometimes travelling with children. They are seeking to reconnect with nature and their partners/children
- They want to become immersed in beautiful natural environments where they can escape the stress of their daily lives and reconnect with their partners and/or young children
- Often being romantic, they want cool nightlife, relaxation, good quality food and drink, contemporary cultural experiences, breath-taking scenery and unique experiences
- They want their holiday to be relaxed and easy but need some 'wow' moments/unique experiences to emphasize the special nature of their holiday together.

### Typical Media Consumption

Facebook, news, Snapchat, TripAdvisor, Pinterest, travel blogs, google, digital content sites (Netflix), some traditional print.

## FAMILY FUN PROFILE

### Keyword

Activities, outdoors and indoor options, relaxing, entertained

### Focus

Happiness and amusement of their children is a priority

### Who are they?

- Parents with young families, typically in mid 30s-40s
- The parents know that if their children are content and occupied they will also be able to have a relaxing time.

### Typical Media Consumption

Facebook, news, TripAdvisor, Pinterest, travel blogs, Google, digital content sites (Netflix), some traditional print.

Please note: Whilst there is potential to grow this audience, the current offering is limited by the relatively small number of family attractions within the immediate area, particularly indoors, making it a difficult area to entertain children in the event of bad weather. Although there are still tourism development needs for this segment in NMD, there is a better all-round family provision in Mourne Mountains as a whole making it a valid target segment.

## TIME TOGETHER PROFILE

### Keyword

romantic, indulgent, relaxation, connect, slow travel, rebalancing, fresh and authentic, ease

### Focus

Finding indulgent hotels where they can relax and enjoy the facilities together

### Who are they?

- Couples late 20s-30s and older couples 45+ looking for a romantic experience who have medium-high disposable income
- Generally, have no kids or are empty nesters
- Indulgent hotels with an emphasis on relaxation
- Seeking a cool nightlife, relaxation, good quality food and drink, contemporary cultural experiences, breath-taking scenery and unique experiences.

### Typical Media Consumption

Instagram (younger), AirBnB (younger), Twitter (younger). Snapchat (younger), Facebook, news, TripAdvisor, Pinterest, travel blogs, google, digital content sites (Netflix), some traditional print and media.

## MICRO ADVENTURER PROFILE

Having considered NMD's product offering as well as consumer trends, a gap in the audience framework has been identified - representing ROI consumers looking for an escape from their frenetic metropolitan life for a weekend in a natural environment with stylish accommodation and lots of outdoor activities. To cover this gap, we therefore recommend creating a Micro Adventurer audience based on busy ROI city-dwellers looking for a short, healthy and active break from reality. The term 'micro adventure' was coined by British adventurer and author Alastair Humphreys as 'small and achievable, for normal people with real lives.'

While the primary focus is to grow the ROI segment and our secondary focus is to maintain our current NI segment – it is recommended that as part of the secondary focus that NMD should work closely with Tourism Ireland to identify 'Rest of the World' opportunities. Two markets that have stood out as 'Short Break' and 'Long Haul' opportunities, are Germany and North America.

### What this means for NMD

NMD is in a great position to position itself as a destination of choice based on the significant tourism trends outlined above. This region possesses the peace and tranquillity that can cater for a health and wellness trip, whilst also having the physical landscape whereby active holidays and adventure travel can take place. The NMD region caters for a wide range of people, including millennials and the activities on offer are well-suited to the likes of solo travellers.









A person is seen from behind, swimming in the ocean. The water is dark blue with gentle ripples. The sky is a pale, hazy blue, suggesting a sunset or sunrise. Two thin, diagonal lines, one green and one blue, cross the upper portion of the image. Overlaid on the right side of the image is the text '05 CAMPAIGN STRUCTURE' in a bold, white, sans-serif font. The number '05' is smaller and positioned above the word 'CAMPAIGN'.

# 05 CAMPAIGN STRUCTURE



The campaign that will be delivered through this Marketing Plan will be structured into three distinct sections:

## REGIONAL

the strengths of each of our main tourism regions that are emerging through engagement with clusters of tourism businesses.

## EVENT-BASED

the established and emerging tourism events that have the potential to be huge draws for people from all over Ireland, such as our Giant Adventure Programme of Summer Events.

## ATTRACTION-BASED

the existing tourism attractions in the region such as our forest parks, heritage and culture sites and the beautiful setting of our coastlines and Mountain trails.



# 5.1

## REGIONAL MARKETING OPPORTUNITIES

As part of the ongoing work of developing our Visitor Experience Plan, we have engaged over 40 key tourism businesses throughout the region and developed six cluster groups.

The development of this Marketing Plan has been undertaken in conjunction with these groups to ensure any future promotional campaigns can maximise the strength of our current tourism offering that exists throughout the district. Through the delivery of this plan we will ensure that tourism businesses will benefit from increased footfall and visitor demand into the district. This necessitates both a bottom-up and a top-down approach to strategic development.

From the bottom-up perspective we have mapped the best visitor experiences that are unique and authentic to this region, enabling us to identify the assets and experiences that provide the best immediate opportunities for growth. We have also worked to help develop the new ideas that are emerging from each area of the district by tying in these new concepts with our overall strategic positioning.

From a top-down perspective we have created a campaign positioning for the entire region that is broad enough to embrace the diverse tourism offering, but specific enough to provide a sense of coherence and personality that can capture the imagination of potential visitors at the 'dreaming' stage of their holiday journey.







## 5.1.1 MOURNE

### Overview

The Mourne Mountains is recognised as one the stand-out key tourism assets of this region and of NI. Tourism stakeholders in the Mourne are committed to delivering the highest possible quality of experience for visitors seeking an outdoor adventure, be it walking, climbing, mountain biking, cycling or kayaking. Tourism businesses are well-positioned to attract international attention for both the quality of service and the beauty of the environment. As a key asset, the Mourne can be positioned as the destination of choice in the island of Ireland's outdoor adventure tourism offering.

Tourism NI's Destination Survey (2014), highlights the Mourne as being the highest of all nine key NI destinations for repeat visitors (although it is lowest for first time visitors). This underlines the ability of the Mourne to be one of the standout, hero destinations for this region and for NI. Visitors to the Mourne were the most likely to recommend the destination to others, most likely to return and most likely to compare the destination favourably with other similar destinations outside NI. Approximately 26,000 user-generated images on Instagram tagged as Mourne Mountains indicates the untapped opportunity of promoting the area.

As part of the ongoing development of our Visitor Experience Plan cluster groups of tourism businesses have been established in Warrenpoint/Rostrevor, Kilkeel, Newcastle/Castlewellan. Collaboration and alignment with key stakeholders in these groups and with the tourism industry across the Mourne will be key in the delivery of this marketing plan in order to leverage 'user generated content' proactively and encourage content creation by businesses aligned to the goals of this plan.

### Product Offering

#### Headliners

- The beauty of the Mourne and the fulfilment and excitement on offer.
- The best outdoor experiences on the Island of Ireland.
- The high quality outdoor events that take place all year round.

#### Supporting Acts

- The other outdoor experiences available near the Mourne.
- The range of other experiences available linked to the outdoors – horse riding, sailing etc.

### Audiences

- Committed outdoor enthusiasts (MTB, climbing, walking etc.) seeking new places to explore and new challenges to overcome (market origin: RoI, NI, UK, Europe).
- Families seeking experiences for that are energising and exciting (market origin: RoI, NI, UK, Europe).
- Novice outdoor enthusiasts seeking an experience that is overseen by experts but still adrenalin-fuelled (RoI, NI, UK).
- School groups (off-peak) looking for a combination of excellent activities and expertise, great location and suitable accommodation in a single package (UK, Europe).
- Businesses looking for incentive packages for staff weekends/days away (RoI, NI).



## 5.1.2 STRANGFORD

### Overview

The Game of Thrones offering in Strangford and the surrounding area is very strong, with a number of complementary businesses working closely together in welcoming a large number of Game of Thrones inspired visitors from across the world. The scenic beauty of Strangford and the Lecale area, is also a key advantage with key assets such as Strangford Lough itself, the coastline and numerous beaches, and properties such as the National Trust's Castle Ward.

### Product Offering

#### Headliners

- The authentic Strangford Game of Thrones experience

#### Supporting Acts

- The outdoor experiences available in Strangford and its environs.
- The range of other locations in the Strangford and Lecale area.

### Audiences

- Committed Game of Thrones fans (North America, ROI and UK)





## 5.1.3 RING OF GULLION

### Overview

Tourism experiences in the Ring of Gullion can be focused on reconnecting with nature and history and discovering (or rediscovering) a sense of soulfulness and wellbeing. The Ring of Gullion's natural and heritage assets can be linked directly to the rich and deep history of the area and be communicated in ways that could attract visitors seeking peace and tranquillity through interactions with our Celtic and Christian past.

In Gullion a cluster of tourism stakeholders, each of with a genuine passion for the area, have been brought together as part of the ongoing development of our Visitor Experience Plan. The campaigns delivered through this Marketing Plan will help to promote the hidden gem that area represents and start to develop key themes, such as:

- The authentic pagan and early Christian sites and monuments.
- The beautiful and undiscovered natural environment.
- The wealth of local knowledge and tour guide experience.
- The opportunity to claim the mindfulness/Celtic spirituality/ wellness marketplace.

Through the development of our Visitor Experience Plan the opportunity for greater partnerships between tourism businesses based in Newry and the Ring of Gullion have been established. It is recognised that tourists visiting and staying in Newry could benefit from the 'City Plus' type of product offering that the Ring of Gullion can offer.

### Product Offering

#### Headliners

- The authenticity and beauty of the area
  - landscape and heritage sites
- The opportunity to claim the mindfulness/ Celtic spirituality/ wellness marketplace.

#### Supporting Acts

- The localised experiences that are on offer (coach tours, classes, smaller events)
- Wider history of the region with its Celtic connections, myths and legends.

#### Audiences

- Free Independent Travellers seeking a unique and authentic experience from regions that are attracted by Celtic culture and an alternative lifestyle (Germany, Holland, UK)
- Families seeking child-friendly events that have something different to offer (ROI, NI).





## 5.14 DOWNPATRICK AND SURROUNDING AREA

### Overview

Downpatrick's unique point of identity is its rich association with the story of St. Patrick, and it has become recognised as one of the cradles of Christianity on the Island of Ireland. As part of the ongoing development of our Visitor Experience Plan a cluster group of key tourism stakeholders has been established and consideration has been given to the opportunity to broaden the appeal of the town, and in developing and delivering 'joined-up' visitor experiences that would be attractive to the domestic NI market and to international visitors.

In addition to St. Patrick, Downpatrick is known for its horseracing, with one of the oldest and best established race courses in Ireland. The first race meeting to be held at Downpatrick was over 300 years ago in 1685 so the town and surrounding area has had a long established connection with the horse racing fraternity. To this end the local cluster group of tourism stakeholders have been instrumental in developing proposals for a four-day festival in June based around a racing festival, family entertainment, music, and the arts and heritage offering of the local area. This event, albeit that is starting off fairly small in scope, has the potential to grow into a major annual festival similar to the Listowel Harvest Festival of racing in Kerry.

### Product Offering

#### Headliners

- The Authentic Story of Saint Patrick
- The other experiences in and around Downpatrick relating to heritage and history, including King Magnus's grave, Down County Museum, Downpatrick Railway Museum, etc.

#### Supporting Acts

- The locations in the broad Downpatrick region of interest – Kilclief Castle, Strangford Castle, Ardglass Castles, Ardtole Church, Ballynoe Stone Circle, Inch Abbey, Mound of Down, Sual, etc.

#### Audiences

- Frequent Independent Travellers and Coach tours interested in heritage, history and spirituality (ROI, UK, Europe, USA)
- Family market seeking fun days out (NI)

In addition to the areas listed above additional work is being undertaken with tourism businesses in other parts of the district to establish how we can create further links and develop additional themes as part of our Visitor Experience Plan.



## 5.2

# EVENT-BASED AND ATTRACTION-BASED MARKETING OPPORTUNITIES

The following details provide some overview as to the main opportunities to promote the NMD region based on the unique and authentic events that are hosted in this district throughout the year:

### 5.2.1 MUSIC

#### Headliners

- Ulster Fleadh (2018)
- Ulster Pipe Band Championship (2018)
- Fiddler's Green
- Soma Festival

#### Audiences

- NI and ROI festival goers
- Traditional music and world music audiences in GB and Europe

### 5.2.2 ACTIVITY TOURISM

#### Headliners

- Mourne Way Marathon
- Mourne International Walking Festival
- Psyche 24-Hour Endurance Cycle
- Camlough Triathlon
- NMD Junior and Senior Golf Championship
- NMD Cycle Sportive
- Red Bull Foxhunt
- Camlough Water Festival

#### Audiences

- Competitor groups for each discipline
- Mountain biking enthusiasts (GB, ROI, NI)

### 5.2.3 SEASONAL

#### Headliners

- Halloween in Newcastle and Newry
- Lughnasa
- Winter Solstice

#### Audiences

- Families NI and ROI.



## 5.2.4 SUMMER EVENTS

### GIANT ADVENTURES

#### Headliners

- Wake the Giant
- Festival of Flight
- Footsteps in the Forest
- City of Merchants
- Skiffies

#### Audiences

- Families NI and Rol.

## 5.2.5 ARTS AND HERITAGE

#### Headliners

- Down Arts Centre
- Down County Museum
- Sean Holywood Arts Centre
- Bagenal's Castle

#### Audiences

- Families NI and Rol
- Art and music followers NI, Rol

## 5.2.6 FOREST AND COUNTRY PARKS, BEACHES AND NATURAL HERITAGE SITES

#### Headliners

- Slieve Gullion Forest Park
- Kilbroney Park
- Tollymore Forest Park
- Castlewellan Forest Park
- Delamont Country Park
- Silent Valley
- Blue Flag Beaches in Cranfield, Murlough and Tyrella

#### Audiences

- Families NI and ROI.
- Walkers and outdoor enthusiasts ROI and GB







06

# TARGETED MARKETING - OUR APPROACH



Within the overall audience segments established by Tourism NI and Tourism Ireland, it is vital for Newry, Mourne and Down to identify niche audiences that can be reached in a cost-effective way through targeted digital media campaigns. For each section of our tourism offering we have identified appropriate audiences in section 4 above.

## 6.1 SOCIAL MEDIA

Social media is a cost-effective, highly targetable and flexible channel which can be used at both the Dreaming and the Planning stage of the travel decision-making process. It can be used as a key channel for creating always-on content, which can be used to keep NMD's position front of mind amongst its target audiences and create linkages back to the NMD tourism website for those who want to find out more.

Given that most social networks have converted to a pay-to-play model in recent years, we will invest in paid media budget to promote social media content to ensure that it reaches our desired target audiences. Additionally, putting paid-for media budgets behind content promotion opens up a world of possibilities in terms of innovative advertising formats and targeting abilities. Users can be targeted according to their demographic profile, interests (e.g. cycling, mountaineering, etc) and behaviours which all enable better return on investment and enhanced performance as the content is being targeting at those users most likely to convert.

For awareness generation, we will use video content formats. Video is the best way to stand out on ever busy news feeds. Facebook and Snapchat have both surpassed 8 billion daily video views and YouTube's 1 billion-plus users are watching hundreds of millions of hours of online video every day.

Another effective format is the 'multi product ad' available on Facebook and Instagram which contain multiple assets within one post which the user can swipe through to interactive with. On a basic level, these could be used to showcase the breadth of landscapes and outdoor activities on offer but, similar to the OOH concept, could also be used to show users the parallel between their workday reality and the getaway potential offered by the Newry, Mourne and Down region. In similar vein, Snapchat Geo Filters could be targeted towards busy professionals in the likes of Dublin city centre, allowing them to visualise themselves taking a break in the Mournes for example



## 6.2 THE IMPORTANCE OF SEARCH

Search engines are used by customers more than any other channel throughout the entirety of the travel decision-making process. Customers turn to search when in need of travel inspiration. They turn to search to find the best destinations for certain types of trip. Search helps uncover more information about a destination - like what its climate is like, what there is to do and how they might get there. Search leads them to the best hotel deals and provides much needed answers. It permeates every step of the travel decision-making process.

Showing up when a prospective visitor searches for specifics about a destination, and having the ability to answer their query through a user-friendly web platform is of fundamental importance to the growth of NMD's tourism volume.

If users cannot find the information they are looking for about your destination, they will look elsewhere.

The Mourne Mountains comes out on top on the number of 'search intent' within the NMD region. High level 'search intent' shows this area as the most popular and desirable in the region and should be positioned as the hero destination within NMD.

When looking for travel inspiration, 83% of customers use social networking channels to get ideas. The Mourne Mountains already gets 26,000 unprompted user-generated images tagged on Instagram, which poses a huge opportunity that needs to be leveraged.



## 6.3 TACTICAL DIGITAL ADVERTISING

Digital advertising is highly targeted and can be used to hone in on precise audience segments who are actively in the consideration stages of planning a trip. This can be achieved through programmatic display advertising, on which ads are served on a network (e.g. Google Display Network) based on targeting variables such as demographics, interests and behaviours. Display advertising formats can also be used for remarketing, which involves targeting those users who have visited the campaign landing page (e.g. by clicking through from a social media).

## 6.4 TOURISM NI PARTNERSHIP

It is proposed that the Council will leverage the opportunity to promote the NMD region to the ROI market through our ongoing partnerships with Tourism NI. As part of Tourism NI's ongoing campaign activity, Northern Ireland is promoted through integrated, high-impact, high visibility marketing activity. By working in close partnership with Tourism NI, the Newry, Mourne and Down region can feature as part of the activity through a series of content and communications that will allow us to focus on accommodation providers, visitor experiences and attractions specific to the region. This is a wonderful opportunity and provides an avenue to reach more of the ROI market, to amplify reach and drive footfall through the leveraging of Tourism NI's marketing budget.

# 6.5

## PARTNERSHIP WITH THE LOCAL TOURISM INDUSTRY IN NMD

In the delivery of this Marketing Plan it is proposed that a new partnership marketing fund be piloted with the local tourism industry, to ensure that local businesses can benefit from funding support in order to inbound drive tourism volume and revenue. In order to attract more visitors from key target markets such as ROI, to encourage them to visit here in the first place and to stay longer in Newry, Mourne and Down, it is essential that we develop a coordinated approach to marketing the district in partnership with local tourism businesses. By developing a Partnership Marketing Fund we can ensure that our marketing message is consistent, coordinated and that we can gain a wider 'share-of-voice' and make a greater marketing impact with our key target audiences.







07

# THE YEAR AT A GLANCE





The previous sections details the tourism offering of this district which we have broken down into three distinct themes – Regional, Event-based and Attraction-based. The information below shows our communications year at a glance. These themes will be promoted using the wider consumer and campaign message – Heaven in a Heartbeat predominantly via search and social channels.

## REGIONAL THEMES

- Unique Outdoor Adventures (Mournes)
- Game of Thrones (Strangford)
- Footsteps of the Celts (Gullion)
- St. Patrick (Downpatrick)

## THEMED ACTIVITY: MUSIC

- Blues in the Bay
- Soma Festival
- Fiddler's Green
- Ulster Fleadh
- Gil Jive
- Newry Fleadh
- Pipe Bands

## THEMED ACTIVITY: SPORT

- Camlough Water Festival & Triathlon / Crooked Lake Triathlon
- Mourne Way Marathon
- P Cycle 8-Hour Race
- Mourne International Walking Festival
- Newry Mourne & Down Summer Trophy & Junior Summer Golf Trophy
- Newry City Triathlon and Festival of Water
- Red Bull Foxhunt
- P Cycle 24-Hour Race
- Cycle Sportive

## THEMED ACTIVITY: SEASONAL

- Lughnasadh
- Halloween in Newry
- Halloween in Newcastle
- Halloween events Crossmaglen, Warrenpoint, Kilkeel, Ballynahinch
- Christmas Switch on Downpatrick
- Christmas Switch on Newry
- Christmas Switch on Crossmaglen, Warrenpoint, Kilkeel, Ballynahinch, Newcastle
- Winter Solstice Festival (Forest Park Activity)

## EVENTS BASED ACTIVITY

- Home of St. Patrick's Festival
- DownTime Festival
- Skiffies Festival Strangford Lough
- Guardians of the Mournes & Gullion Festival
- Footsteps in the Forest
- Festival of Flight
- Wake the Giant
- City of Merchants
- Hans Sloane Chocolate Festival
- Winterfell Festival
- Ballynahinch Harvest & Country Living Festival
- Ballynahinch Game & Market Fayre
- Lunasa (Forest Park Activity)



## **FACILITY BASED THEME: ARTS & HERITAGE**

- Down Arts Museum
- Down Art Centre
- Sean Hollywood Arts Centre
- Begenal's Castle

## **FACILITY BASED THEME: FOREST PARKS**

- Slieve Gullion Forest Park
  - Kilbroney Forest Park
  - Tollymore Forest Park
  - Castelwellan Forest Park
  - Silent Valley
- 







# APPENDIX





# ADDITIONAL INFORMATION ON TARGET MARKETS

While the primary focus is to grow the ROI segment and our secondary focus is to maintain our current NI segment – it is recommended that as part of the secondary focus that NMD should work closely with Tourism Ireland to identify ‘Rest of the World’ opportunities. Two markets that have stood out as ‘Short Break’ and ‘Long Haul’ opportunities, are Germany and North America.

## **Germany Short Breaks:**

Germany is the second most important outbound tourism market in the world. The island of Ireland gets 1% of this market with over 400,000 German people visiting every year. It is the third most important source market for the island of Ireland and is the largest market for overseas anglers, accounting for 15% of all overseas angling visits. German visitors stay on average 10 nights with a wide geographical spread. However, only around 10% of these visitors come to Northern Ireland.

According to Tourism NI research, over 75% of German holidaymakers come to explore the sights and culture of the island of Ireland and many German tourists enjoy outdoor activities such as hiking, cycling and fishing. They enjoy un-spoilt natural scenery and book well in advance. Nature is a bigger influence for Germans than for other European countries when deciding on a holiday. This means that having excellent green credentials is something that might appeal.

70% of German holidaymakers arrive between April and August with May, June and July being the most popular months. 75% of German holidaymakers use the internet to book all or part of their holiday and they like the information to be in German although many speak English. 68% of the German market has expressed an interest in visiting the island of Ireland in the future.

According to Mintel (2015), the bulk of the German outbound market is devoted to leisure travel. FUR, Reiseanalyse 2015 calculates that Germans took some 83.9 million short breaks in 2014. Three quarters (76%) are taken within Germany and the remaining 24% are taken abroad, equivalent to 17.5 million trips. Of this, 6.4 million go to cities abroad and 11.1 million go to non-city destinations for their short breaks. London is the most popular foreign destination for short breaks, where Germans took 1.1 million trips in 2014. Amsterdam, Paris, Barcelona, Prague and Vienna are also among the leading cities visited abroad for short breaks. The main reasons for short breaks are a city break, visiting friends and family, relaxation, cultural trips or an activity holiday. Couples take over half (53%) of foreign short breaks to cities whereas 28% are made by solo travelers.





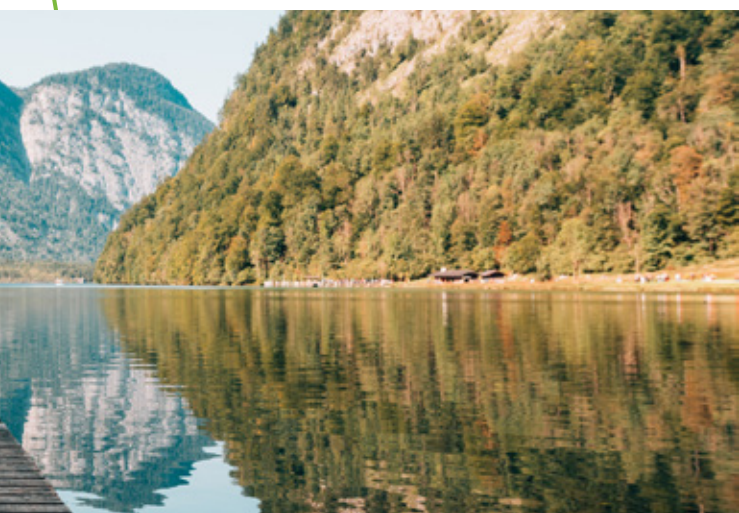
### North America:

The USA is the second most important tourism market for the island of Ireland. Visitors from the U.S. and Canada often include a trip to Northern Ireland as part of a wider European tour and include Northern Ireland as part of an overall trip to the island of Ireland. They form an excellent target market for Northern Ireland as they speak English and are easy to promote too due to their high usage of digital channels. Northern Ireland welcomes a higher proportion of Canadian visitors in comparison to other markets. Typically, a third of Canadians visit Northern Ireland when holidaying on the island of Ireland. Over 50% of Canadian visitors are over 45. As the island of Ireland is a long-haul destination, North American visitors are likely to use tour operators when they plan their travel.

Cultural and ancestral links are a key motivator for visits here from people living in North America. 36 million Americans claim Irish ancestry and there are 25 million people of descent from NI in North America. While here they are very keen to visit historical and cultural sites and their use of hotels is higher than

the other main markets. Visitors stay for on average 8 nights on the island of Ireland. Often it is their first visit and they are keen to tour the island; 60% of visitors are over 35 and they are high spenders. US outbound travelers are the second-biggest spenders in terms of tourism expenditure, according to country ranking by the UNWTO. Golf is often a key draw for many North American visitors.

According to Mintel research (2015), on long-haul routes, US outbound travellers choose to experience different cultures and this is one of the reasons they visit destinations around the world. In terms of culture, areas of historic and natural beauty are important. Indeed, this is a major reason for foreign travel to Europe where city trips and touring holidays are popular. Experiential travel is increasingly desired by US outbound travellers, with an emphasis on authentic experiences.





# OTHER GENERAL TRENDS

## **Importance Of Millennials:**

Millennials are one of the fastest growing groups of adventure travellers. This generation are already traveling more for business than other generations and they're more likely than their older counterparts to extend business trips into vacations. Expedia's Future of Travel Report found that millennials are taking more vacations in general – travelling an average of four times per year compared to three times per year for older segments of the population. Unlike their baby boomer parents, they stay away from traditional cruise and beach vacations and instead crave adventure. This often includes outdoor recreation opportunities and exploring local environments. Once they're travelling, 97% of millennials share their experiences on social media, with nearly 73% posting every day. All of this sharing is hugely influential for their peers.

## **Adventure travel and active holidays:**

According to Mintel (2017), active and adventure travel are among the most significant trends in the travel and tourism industry at present, and have been for a number of years. Active holidays can be taken virtually anywhere, and holiday locations are as diverse as the activities and the participants themselves. Nations that seem particularly interested in active holidays include China, Germany and USA.

Wanting to stay fit and healthy at a time when many nations are experiencing longer life expectancies is an important component of the motivation to take an active holiday. The key reasons for undertaking this type of travel, however, appear to be the opportunity to engage in authentic and immersive travel experiences, to see a destination in a more unique way and for the bonding opportunities that active holidays provide. Adventure travellers are more likely than traditional travelers to prioritise where they go over who they go with, citing natural beauty and available activities as the most important aspects. However, group travel still dominates. According to the Adventure Tourism Market Study (2013), the largest groups of adventure travelers are: those who travel with a spouse or partner (37%); those who travel with families and children (30%) and those who travel with friends (21%).

## **Free independent travellers:**

A recent survey (Lonely Planet, 2017) predicted solo travel to be a key trend in the coming years, with 51% of respondents saying they'll be taking their next holiday solo. Germany is leading the way with 80% of German respondents saying they will go it alone, followed by 69% of UK respondents and 67% of Canadians. Unsurprisingly, this solo travel trend goes hand-in-hand with independent travel; just 6 % of people say they will use a travel agent in 2017. An app called SoloTraveller has recently been launched. This app connects like-minded travellers who speak the same language and share a love of travel. Travellers can connect to share costs for taxis, tours, or anything else.

## **Health and wellness tourism:**

An estimated 17 million travellers identify themselves as being 'health and wellbeing' focused, with 40% of them travelling regularly (HVS, 2014). Wellness tourists spend 130% more than the average tourist (Body & Soul). 'Switch Off' is a consumer trend identified by Mintel (2013) that reflects how technology has created inescapable levels of exposure and has led to consumers seeking reconnection with the real world. 'Retreats' such as Kamalaya in Thailand, Gwinganna in Queensland and Billabong Retreat in New South Wales are successful in this sector. In Ireland, retreats exist such as Cloona Health retreat in Westport, County Mayo.

What this means for NMD: NMD is in a great position to position itself as a destination of choice based on the significant tourism trends outlined above. This region possesses the peace and tranquillity that can cater for a health and wellness trip, whilst also having the physical landscape whereby active holidays and adventure travel can take place. The NMD region caters for a wide range of people, including millennials and the activities on offer are well-suited to the likes of solo travellers.





