

8th April 2025

Northern Ireland Hotels Federation

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Enrichment Explorers





Aim of this session

- Introduction to our overseas holidaymaker segmentation
- Getting to know our key target segment: Enrichment Explorers

WHAT IS SEGMENTATION ...

Segmentation is like dividing a big crowd into a smaller group of people based on shared characteristics

It enables us to ...



Target marketing activity: creating marketing campaigns that resonate with a specific group

Tailor marketing efforts to specific groups of people to drive interest in visiting a destination

Ultimate goal: persuade the highest value overseas holidaymakers to choose the island of Ireland as their holiday destination

PROGRAMME OVERVIEW – KANTAR RESEARCH



Discover



- Desk research
- Stakeholder interviews
- Review of previous segmentation



Segment



- Quantitative survey
- 13,000 adults (18+) across 7 markets: GB, US, Germany, France, Italy, Spain and Canada
- Travel needs, desire and attitudes
- 7 segment solution



Focus



- Identify and prioritise growth opportunities
- Focus on target segment and bringing to life with profiles



Spark



- Online community board in top 4 markets
- Enrich our understanding of our target segment



Activate



- Creation of pen portraits and segmentation videos
- Embed the framework within the organisation and beyond

CONSULTATION AND COLLABORATION THROUGHOUT: STAKEHOLDER SESSIONS, INTERNAL GROUP SESSIONS AND EXTERNAL ADVISORY GROUP



INTRODUCING OUR OVERSEAS HOLIDAYMAKER SEGEMENTATION

INTRODUCING THE SEGMENTS...

We spoke to **13,000** overseas holidaymakers across seven markets: GB, US, DE, FR, IT, ES, CA

Segmented them into distinct groups that are defined by their **attitudes and holiday needs**

Which produced **7 segments**



INTRODUCING THE SEGMENTS...



SEVEN SEGMENT SOLUTION



Laid Back Loungers

Segment 1



Looking for ultimate relaxation amongst the sun, sea and sand, they have very little interest in doing any activities or sightseeing apart from simply eating/drinking and relaxing



Social Connectors

Segment 2



Open to meeting like-minded people and having fun with other tourists, this group want to be entertained with activities, festivals and a good nightlife. They are not afraid of daring experiences but have little interest in sightseeing.



Adventure Seekers

Segment 3



Not afraid to push their limits, this group are after an action-packed holiday with plenty of exciting activities. They want to see big ticket attractions and experience the WOW factor so they can share their stories with others.



Enrichment Explorers

Segment 4



Drawn to undiscovered destinations, they enjoy authentic moments with friendly locals to broaden/stimulate their minds and to experience the vibrancy and character of the place and people, whether through history, art, culture or nature.



Simplicity Seekers

Segment 5



Looking for a slower pace of life, this group prefer to holiday in their own country opting for road trips over flights. They simply want to enjoy the beauty of the landscape and prefer to do very little on holiday.



Bucket Listers

Segment 6



Looking to fulfil their bucket list, this group are on a journey of discovery, exploration and well-known attractions. They choose to go somewhere different on holiday every time but do not want anything too active or strenuous.



Escape and Bond

Segment 7



Looking to have fun and spend quality time with loved ones, whilst keeping the kids happy. This group enjoy travelling and planning holidays looking for the best discounts. They are busy families so don't often have enough hours to do everything.

DEPARTURES

So, which segment holds the most potential?



WHO TO TARGET?

We've identified key criteria to assess the attractiveness and attainability of the segments in line Tourism Ireland's policy objectives.



This criteria is used to help us find what we define as 'high value' holidaymakers:

How <u>attractive</u> is the segment?					Is the segment <u>attainable</u> ?	
Sizeable and high revenue	Seasonality	Long trips	Regionality	Sustainable	Warmer to IOI, incl. NI	Fit with IOI product
Are sizeable and likely to spend more	Take holidays outside of peak season (therefore less likely to have kids at home)	Will take longer trips (4+ nights)	Travel around the island, not just in the big cities	Travel sustainably or are attitudinally more sustainable	Open to travelling to IOI and have visited (intend to) Northern Ireland specifically	Interested in what Ireland is good at – (culture, people landscape / scenery, heritage)

HOW EACH SEGMENT SCORES AGAINST KEY POLICY CRITERIA

An overview of each segment vs VATTs criteria.

The framework also offers other **potential sources of future growth** to be explored outside of key target segment of Enrichment Explorers

	1 Laid Back Loungers	2 Social Connectors	3 Adventure Seekers	4 Enrichment Explorers	5 Simplicity Seekers	6 Bucket Listers	7 Escape & Bond
Sizeable and high revenue	✗	✓	✓	✓	✗	✗	✗
Seasonality	✓	✗	✗	✓	✓	✓	—
Long trips	—	✗	✗	✓	—	✓	—
Regionality	✗	—	—	✓	✗	—	✗
Sustainable	✗	✓	✓	✓	✓	✗	✗
Warmer to IOI, incl NI	✗	✓	✓	✓	✗	—	✗
Fit with IOI product	✗	✗	—	✓	—	✓	✗

Score against key policy criteria

Good	Average	Poor
✓	—	✗

LET'S HEAR MORE FROM OUR ENRICHMENT EXPLORERS...



THE DEFINING NEEDS OF ENRICHMENT EXPLORERS & OUR PREVIOUS TARGET CULTURALLY CURIOUS HAVE COMMON THEMES...

Culturally Curious



Enrichment Explorers

Discover and Stimulate

Motivated by curiosity and learning, both segments want to immerse, explore and discover.



Sense of place, through history, culture and local people

With a longing for authentic local experiences both segments want to immerse themselves in their surroundings



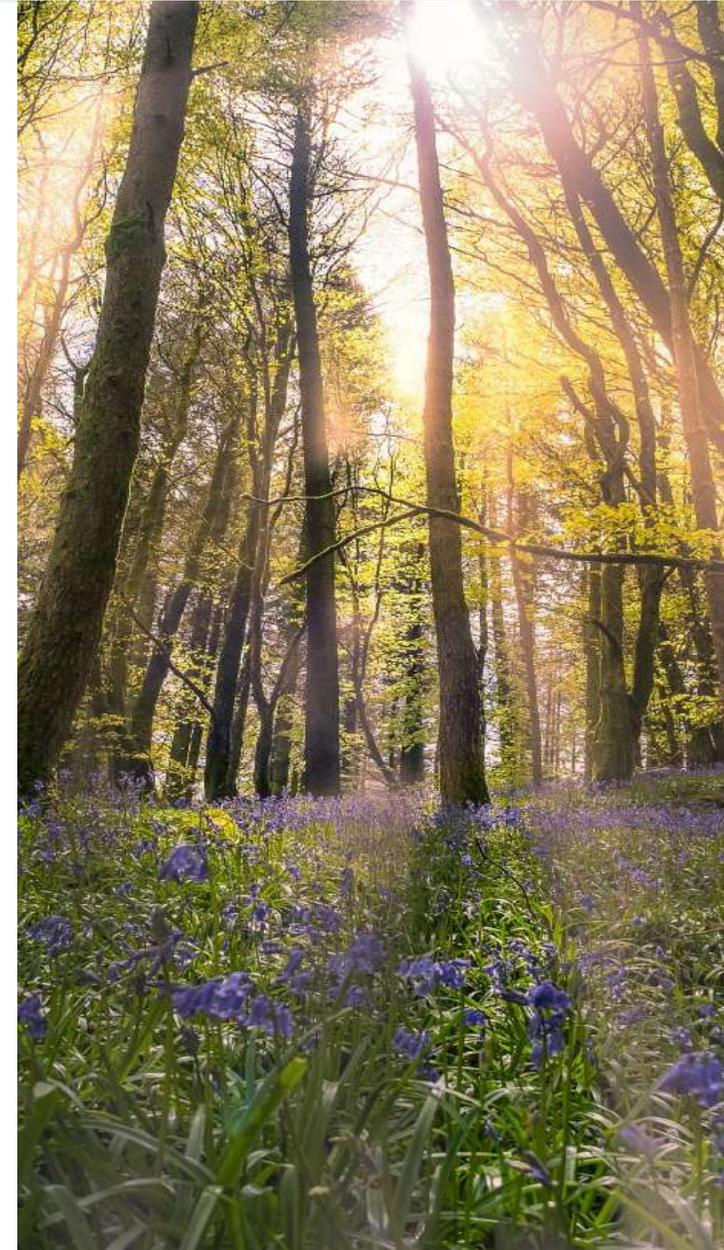
Exploring Nature

Both enjoy hiking/walking/cycling but also relaxing surrounded by nature and wildlife



Pre-Planned

Both segments pre-plan aspects of their trip, using online research or offline resources.



ENRICHMENT EXPLORERS HAVE EVOLVED FROM 'CURIOUS TO LEARN', TO 'CONNECT AND ENRICH'

From Curious to Learn
Culturally Curious

Discover and Stimulate:

Discovering the big attractions



To Connect & Enrich
Enrichment Explorers

New and unique experiences to stimulate and broaden my mind

Sense Of Place and People:

Authentic local experiences



To feel the character of the place and people

Connect to Nature:

Appreciate the natural environment



To feel connected to nature

Curious to learn:

Turn to others for advice



Like to be seen as the knowledge expert

Holiday planning:

*Advanced planning
Weighing up options*



Planning and research is part of the fun and thrill of discovery



WORKING TOGETHER TO SUCCESSFULLY IMPLEMENT THE SEGMENTATION

How you can help us engage with the Enrichment Explorers



IMAGERY:
Showcase people
interacting with nature



LOCAL INSIGHTS:
Leverage local knowledge and
voices to uncover hidden gems
and unique experiences

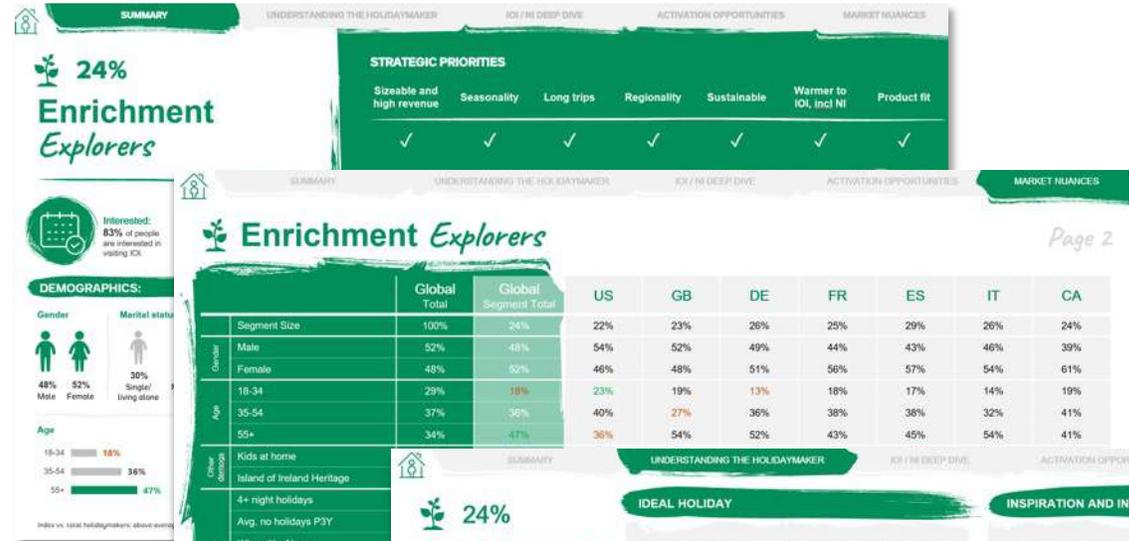


STORYTELLING:
Tell authentic stories of
the place, product, and
experience



OFF-THE-BEATEN-PATH:
Offer exclusive experiences
e.g., local food and drink,
historical sites and cultural
attractions

RICH, IN-DEPTH CONTENT



www.tourismireland.com/research-and-insights

